FEDERAL STUDENT AID

We Help Put America Through School

FSA Modernization Partner

NSLDS II Reengineering
User Interface Design

Version 1.0

July 19, 2002

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Document Control

Version Number	Description	Release Date	Author
1.0	Initial Issue	July 19, 2002	Sunil Malhotra

1 NSLDS User Interface

1.1 NSLDS User Interface Overview

There are three main applications in the legacy NSLDS architecture that serve as the gateway for accessing and manipulating Title IV data online. The applications include the Financial Aid Professional (FAP) website, Student Access Financial Aid Review (SAFAR) website, and the Customer Information Control System (CICS). Each application contains a variety of screens that support a particular NSLDS functional area. The User Interface Inventory Matrix (**Reference Appendix A**) documents a comprehensive list of screens for each application and the NSLDS functional area(s) it supports currently. Each application also consists of various permission levels that determine a user's access rights to view, add, update, and delete data online.

The FAP website, which can be found at http://www.nsldsfap.ed.gov, will be the main user access point for NSLDS II data. It provides support for users by tracking the financial aid and enrollment history for Title IV Aid recipients, organizational information for Title IV aid financial partners, access to predefined reports, and student transfer monitoring. The main users of this website are Department of Education (ED), guaranty agencies (GAs), lenders, and schools. A lender or school may also allow a servicer to access the website and provide online updates on their behalf. Each user must be registered with the website and can only log on with a valid User ID and Password.

The existing FAP website is widely accepted by the user community. The popularity of this website can be witnessed by taking a closer look at the increase in use of the online Enrollment Reporting functionality by schools:

	January	February	March	April
Number of schools performing web enrollment reporting in '01	518	688	509	663
Number of schools performing web enrollment reporting in '02	741	700	842	725
Number of new schools to web enrollment reporting in '02	NA	367	223	146

Table 1, Enrollment Reporting through the FAP website

The major area of enhancement for the FAP website is the existing report functionality. Reports are currently accessed through the Main Menu, which allows users to execute predefined reports and receive the results either in their SAIG mailbox or download them directly (depending on the users permission level). If a user requires data that is not supported by a predefined report, they are limited to either developing their own query or contacting the support center to develop a query for them. In order to create a query, a user must be familiar with Structured Query Language (SQL), which is the code used to develop a query, the NSLDS data model, whose data elements are used within the SQL, and the Query Management Facility (QMF) tool, which is the application used to execute the query. In order to empower users and improve the customer experience for executing reports and queries, a more flexible MicroStrategy reporting front end will replace the existing report screens. It will allow users to create reports / queries, and extracts without the knowledge of SQL, the NSLDS data model, or the QMF tool. The new reporting functionality will still be accessible through the Main Menu of the FAP website. A more detailed discussion regarding the report screen changes can be found in **Section 1.3.5 Reporting** and the Report Content Descriptions & System Procedures document.

In addition to the changes to the reporting screens and functionality, a few screens on the FAP website will be enhanced based on user feedback. The enhancements will not be significant and will enable the users to interact with the same screens that they have become accustomed to over time. This will minimize the impact to the user community.

The SAFAR website, which can be accessed at http://www.nslds.ed.gov, allows students to securely view and track their financial aid history. They have the ability to view their Title IV loans at a summary or at a detailed loan level. The summary loan level data allows a student to view all Title IV loans they are responsible for in a consolidated format. The detailed loan level data tracks the history of each loan throughout its lifecycle. Each student must be registered with the website and must have a valid User ID and FSA PIN to logon. During discussions with the user community, no enhancements were identified for this website. This will result in no major changes to the screens and more importantly eliminate any impact to the student community.

CICS is IBM software that allows ED personnel to connect to the NSLDS mainframe and perform online transactions. Users have the ability to update or access data online from ED Headquarters or Regional offices. CICS initially allowed users to access the following menus:

- Aggregate Inquiry Main Menu
- Default Rate Main Menu
- Report Selection Menu
- Borrower Tracking Security
- Financial Aid Transcript Summary
- Student Status Confirmation Menu
- Aid Overpayment

- Organization Contact
- Loan Repayment Information for Schools

The majority for the CICS functionality has been transitioned to the FAP website in response to user demand for a more user-friendly and flexible tool. The remaining functionality, which includes screens from the Default Rate and Student Status Confirmation menus will be transferred to the FAP website as part of the NSLDS II reengineering initiative. This will complete the transition to the FAP website, therefore, clearing the path for retiring CICS. Once CICS has been retired, the FAP website will serve as the default application for ED personnel to access NSLDS II data.

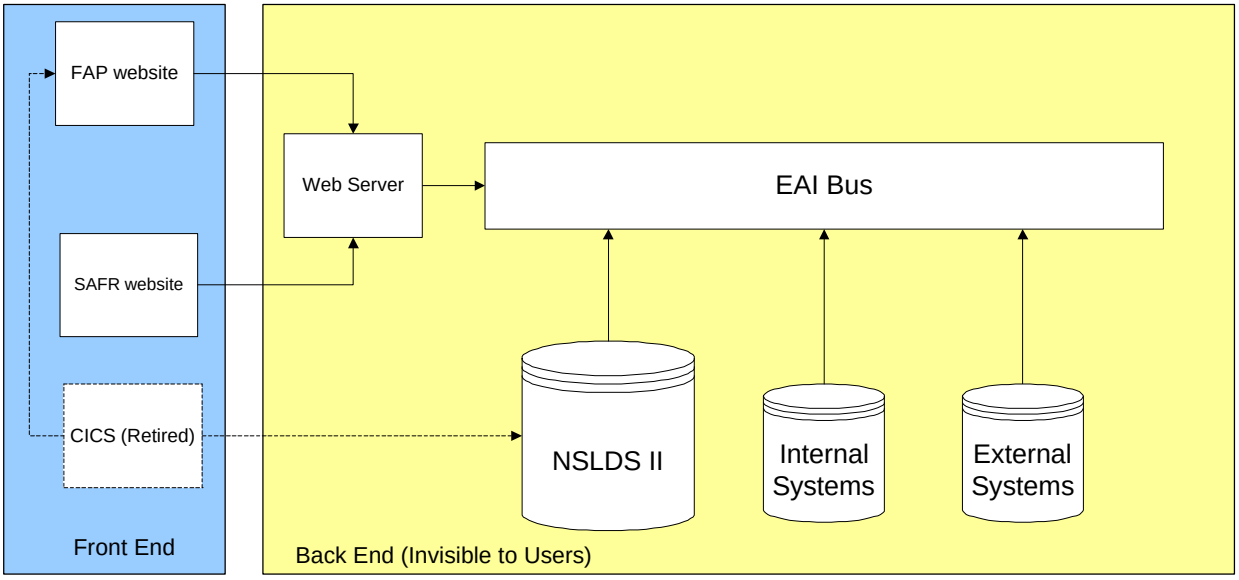


Figure 1, NSLDS II User Interface Diagram

1.2 NSLDS User Interface Summary

The screen enhancements that will be implemented for NSLDS II have been summarized below in the NSLDS User Interface Summary table. A more detailed description of each screen change can be found in later sections of this document.

User Interface	Purpose	Main Users	NSLDS II Screen Enhancements
FAP website	A web interface that allows users to access and update specific Title IV data based on their user privileges. The FAP website will support financial aid,	ED GA Lenders / Servicers Schools / Servicers State Agencies	1. The following screens will be enhanced: • Loan History • Pell Grant History • Cohort Default

User Interface	Purpose	Main Users	NSLDS II Screen Enhancements
	enrollment, organizational contact, reporting, and student transfer monitoring functionality.		Rate History List • Organization Contact Add 2. The new report screens will replace the functionality from the Organization Search Pop Up window.
SAFAR website	A web interface that allows Title IV recipients access to view their loan information.	ED Schools Students	1. There will be no major changes to the screens.
CICS	IBM software that resides on the desktops of ED personnel. It allows users to make updates online to NSLDS.	ED	1. Functionality from the following screens related to Default Rates will be converted to the FAP website: • Rate Substitution • Rate Combination • Suspend Default Rates 2. Functionality from the following screens related to Enrollment will be converted to the FAP website: • Enrollment Waiver

Table 2,User Interface Changes Summary

The remaining sections of this document discuss in greater detail each screen that will support the FAP and SAFAR websites. Each screen will contain the following information:

Screen Name: Defines the name of the screen

Description	Defines the purpose of the screen.
Functional Area	Identifies the NSLDS II Functional Area(s) supported by the screen.
User Group	Identifies Users Groups that will have access to this screen.

Reference	Lists references that provide additional detail for each screen.
Comments	Identifies additional information regarding each screen (e.g., enhancements to the screen).

Note:

- The screenshots for the FAP website are based on the latest information provided to us through the NSLDS User Documentation - Chapter 3 Web Access, April 2002 and NSLDS Enrollment Reporting Guide, April 2002. Please refer to these documents for additional details of the existing FAP website. These documents can be located at the following website: http://ifap.ed.gov/IFAPWebApp/currentNSLDSPag.jsp.

- Detailed screen specifications (e.g., field names, validations) will be provided in the detailed design phase of the project.

- Section 508 of the Rehabilitation Act of 1998 mandates a website accessibility review. Section 508 requires that electronic and information technology developed, procured, maintained, or used by Federal government agencies must be accessible to persons with disabilities. The system must allow a person with a disability to have comparable access to and use of information as a person without a disability.

  The Assistive Technology Group within the FSA Technology Center is responsible for performing Section 508 reviews. During the Detailed Design and Build phases, the NSLDS II Modernization Partner team will work with the Assistive Technology Group to verify that the design of the online screens meets Section 508 requirements. The formal accessibility review for NSLDS II will then be conducted during the Test phase.

1.3 Financial Aid Professional Website

1.3.1 System Log on

A user must have a valid User ID and Password to log on to the FAP website. After a successful log on, the user is presented with a Privacy Act statement for confirmation. The Privacy Act reminds users of their obligations and responsibilities related to the sensitive data they are about to view. Upon acknowledgment of the Privacy Act, the user is routed to the Menu page. The Menu page allows a user to link to the Message Detail, Financial Aid, Enrollment, Organization, Report, and Transfer Monitoring pages. It also includes help-related links and icons, which are used throughout the site as quick and easy information and navigation tools. Based on the user's access privileges, they will be able to view certain screens or data within the FAP website.

1.3.1.1 Screen Name: System Log On

Description	Allows Schools, Lenders, GAs, Servicers, ED employees, and state agencies to log on to the FAP website.
Functional Area	This screen does not support any of the core NSLDS functions.
User Group	ED/FSA, Schools, Lenders, GAs, State Agencies
Reference	NSLDS User Documentation, Chapter 3.1 System Logon.
Comments	There were no requests to modify this screen.

Figure 2, System Logon

1.3.1.2 Screen Name: Privacy Act

Description	Allows a user to acknowledge they have read and agree with the Privacy Act after each log on.
Functional Area	This screen does not support any of the core NSLDS functions.
User Group	ED/FSA, Schools, Lenders, GAs, State Agencies
Reference	NSLDS User Documentation, Chapter 3.1 System Logon.
Comments	There were no requests to modify this screen.

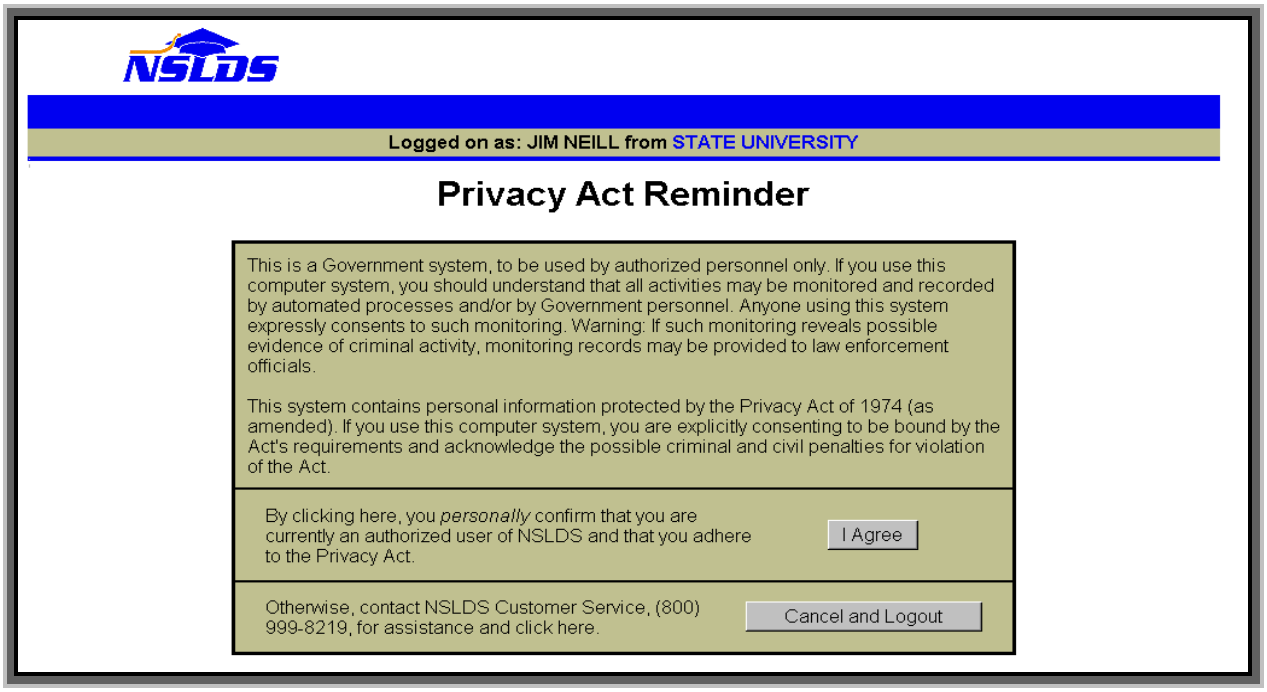


Figure 3, Privacy Act

1.3.1.3 Screen Name: Menu

Description	Allows a user the ability to navigate to the Message Detail, Financial Aid, Enrollment, Organization, Report, Transfer Monitoring, and Support screens (depending on authorization).
Functional Area	This screen does not support any of the core NSLDS functions.
User Group	ED/FSA, Schools, Lenders, GAs, State Agencies
Reference	NSLDS User Documentation, Chapter 3.2 Menu.
Comments	There were no requests to modify this screen.

Figure 4, Menu

1.3.1.4 Screen Name: Change Password

Description	Allows a user to change their password.
Functional Area	This screen does not support any of the core NSLDS functions.
User Group	ED/FSA, Schools, Lenders, GAs, State Agencies
Reference	NSLDS User Documentation, Chapter 3.2.1 Change Password.
Comments	There were no requests to modify this screen.

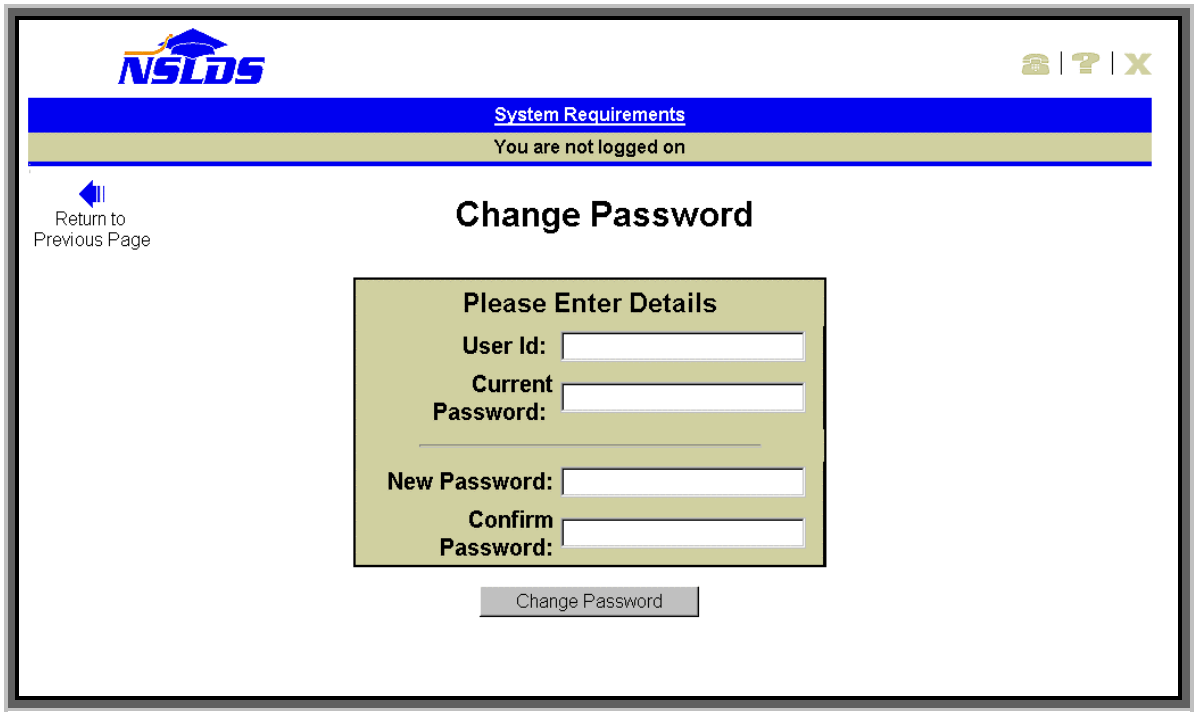


Figure 5, Change Password

1.3.1.5 Screen Name: System Requirements

Description	Describes the system requirements for the FAP website.
Functional Area	This screen does not support any of the core NSLDS functions.
User Group	ED/FSA, Schools, Lenders, GAs, State Agencies
Reference	NSLDS User Documentation, Chapter 3.2.2 System Requirements.
Comments	There were no requests to modify this screen.

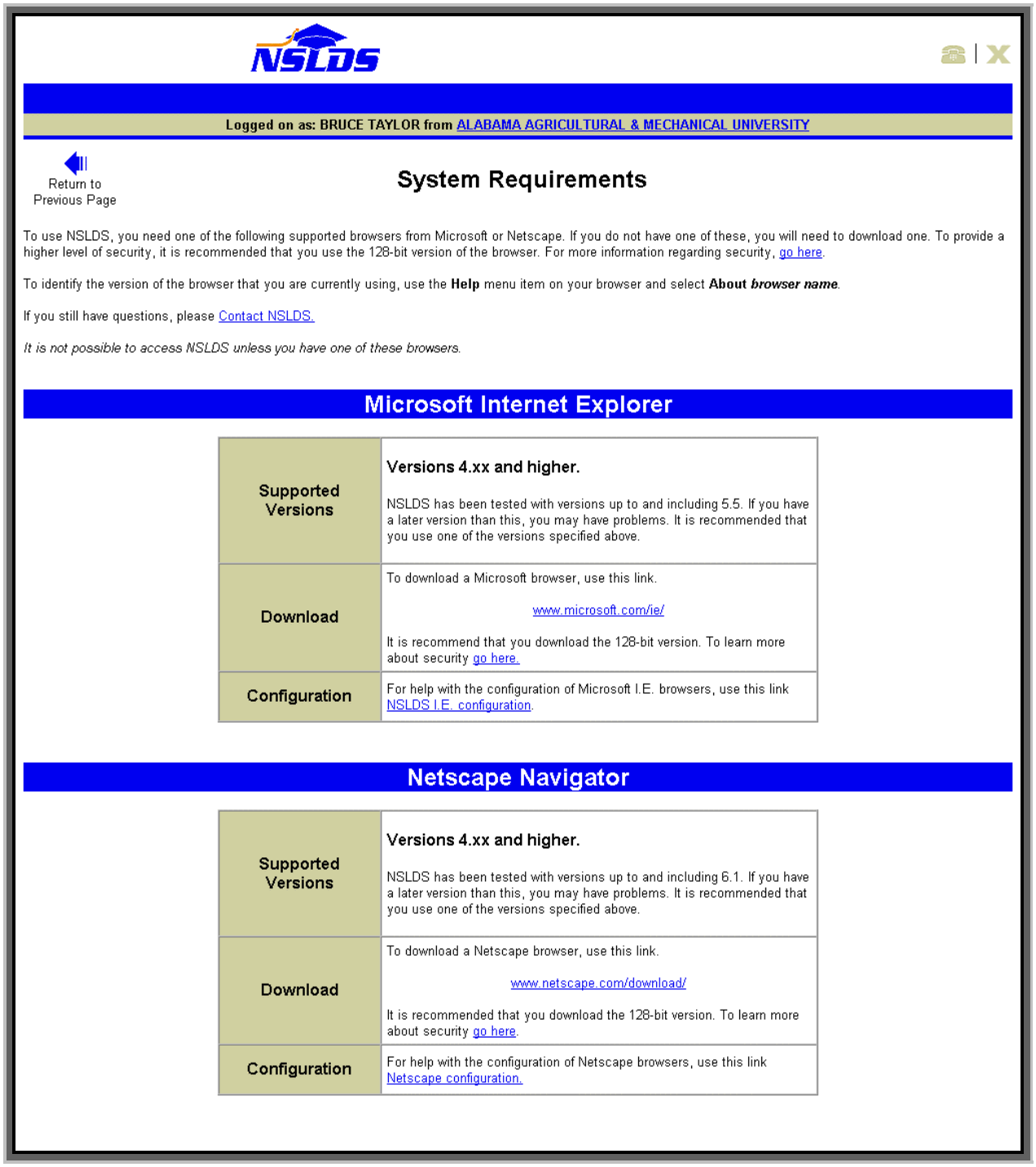


Figure 6, System Requirements

1.3.1.6 Screen Name: Contact Us

Description	Provides user help contact information.
Functional Area	This screen does not support any of the core NSLDS functions.
User Group	ED/FSA, Schools, Lenders, GAs, State Agencies
Reference	NSLDS User Documentation, Chapter 3.2.3 Contact Us.
Comments	There were no requests to modify this screen.

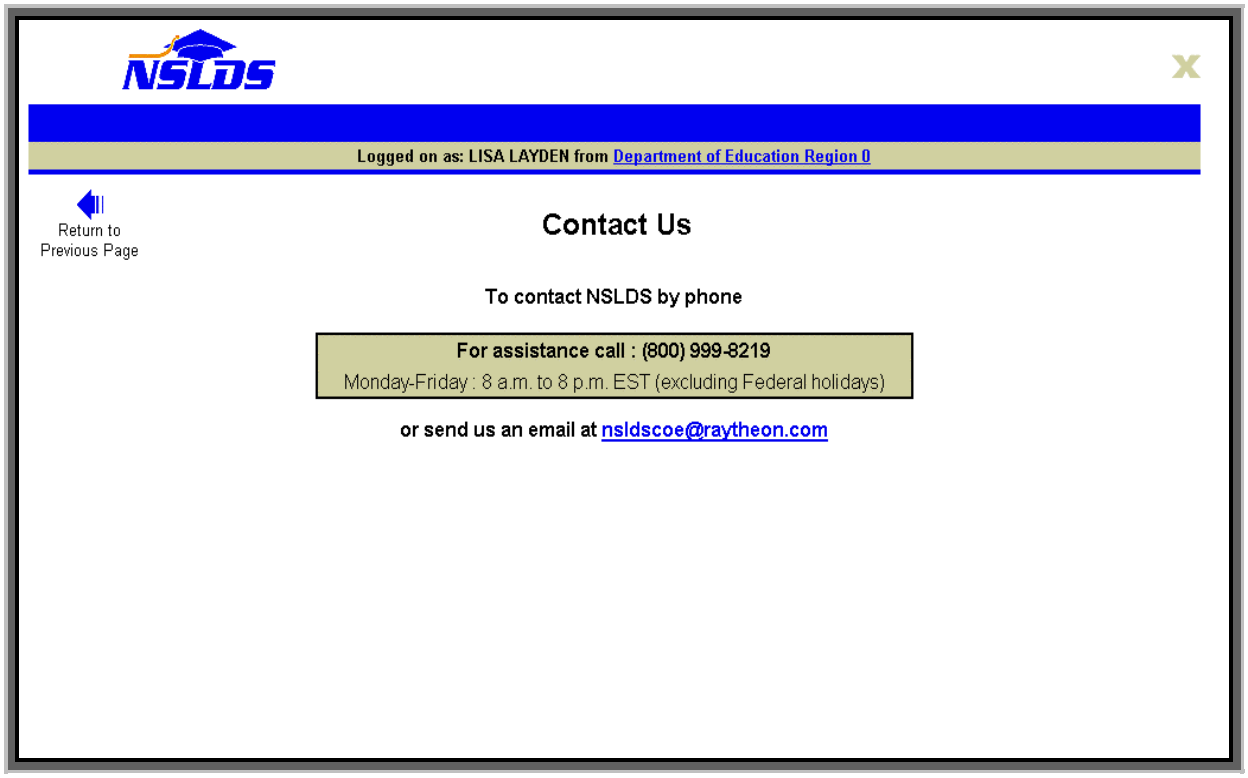


Figure 7, Contact Us

1.3.1.7 Screen Name: Frequently Asked Questions (FAQ)

Description	Provides responses to frequently asked questions.
Functional Area	This screen does not support any of the core NSLDS functions.
User Group	ED/FSA, Schools, Lenders, GAs, State Agencies
Reference	NSLDS User Documentation, Chapter 3.2.4 FAQ .
Comments	There were no requests to modify this screen.

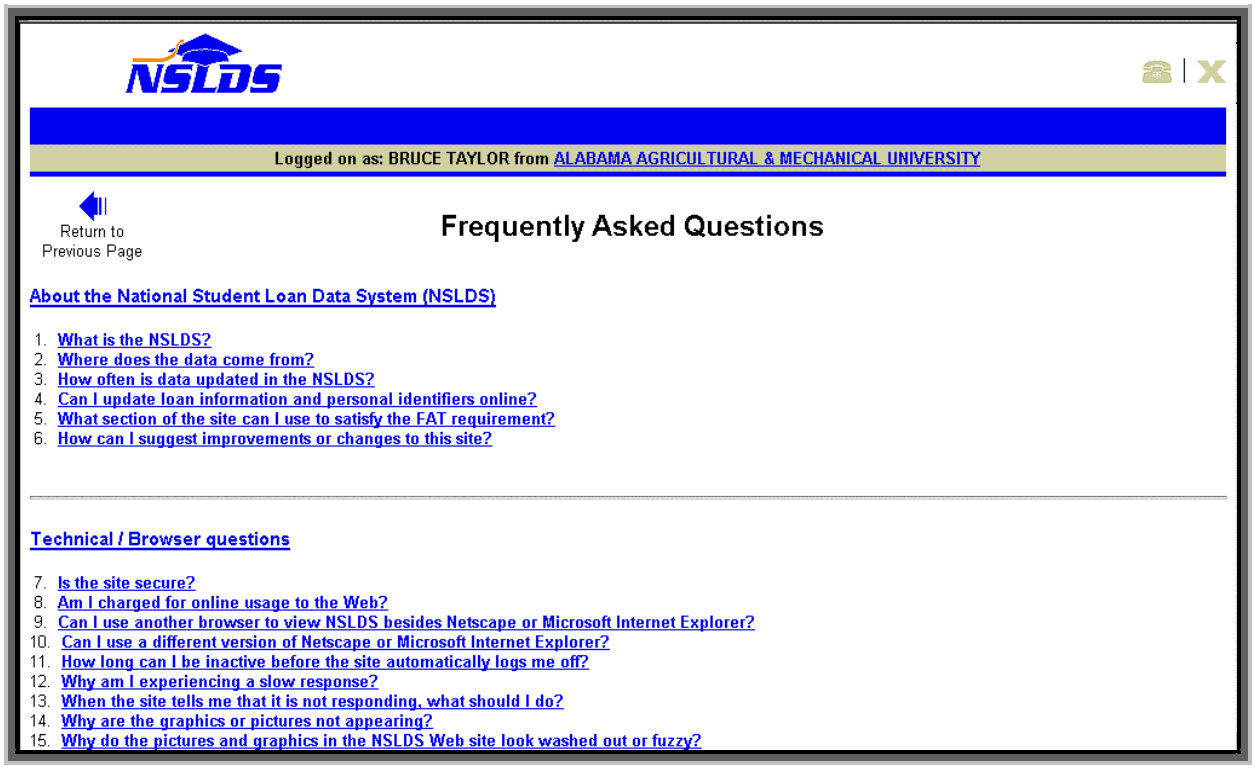


Figure 8, Frequently Asked Questions

1.3.1.8 Screen Name: Download Help

Description	Allows a user to download help files related to the FAP website.
Functional Area	This screen does not support any of the core NSLDS functions.
User Group	ED/FSA, Schools, Lenders, GAs, State Agencies
Reference	None.
Comments	There were no requests to modify this screen.

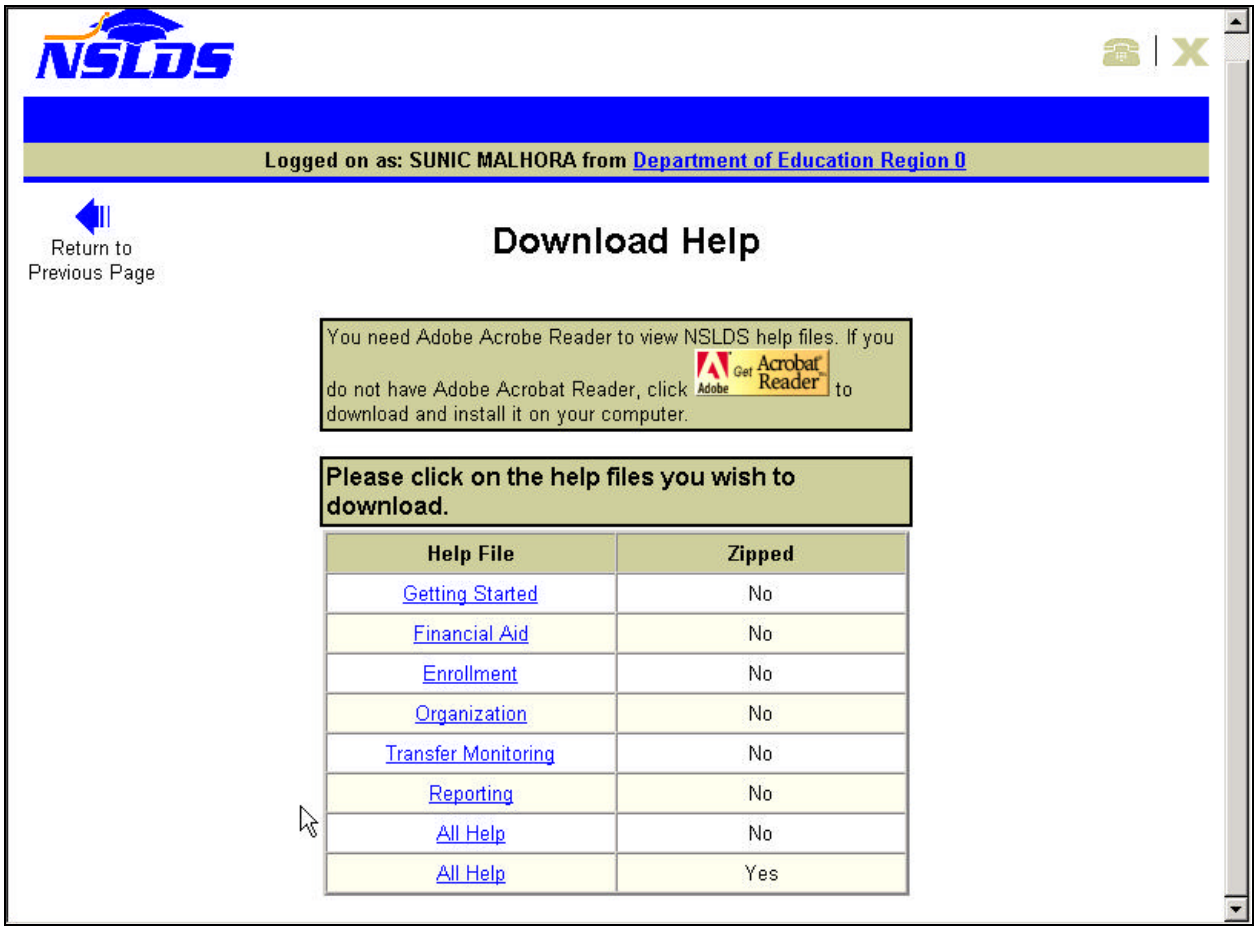


Figure 9, Download Help

1.3.1.9 Screen Name: Help

Description	Directs a user to the help page. Each NSLDSFAP page contains a help icon, which directs a user to the help page. A user can also access a glossary of the NSLDS website terms.
Functional Area	This screen does not support any of the core NSLDS functions.
User Group	ED/FSA, Schools, Lenders, GAs, State Agencies
Reference	NSLDS User Documentation, Chapter 3.1.2 Help.
Comments	There were no requests to modify this screen.

Additional Comments:

- Clicking the icon takes you to the NSLDS Customer Service Center page with contact information.

- Clicking the icon takes you to a Help page. These icons appear in areas where you may have questions. From Help:
  - Clicking the G icon takes you to the glossary of NSLDS website terms.
  - Clicking the P icon takes you to Print. (This icon appears from the Netscape browser only. You can also print by using the Microsoft Internet Explorer browser and right-clicking your mouse.)

- Clicking the X icon logs you out and returns you to the Logon page.

The following icons also may appear:

- Icon alerts you to factors that can affect a student's eligibility.

- Icon identifies information that is useful but not critical.

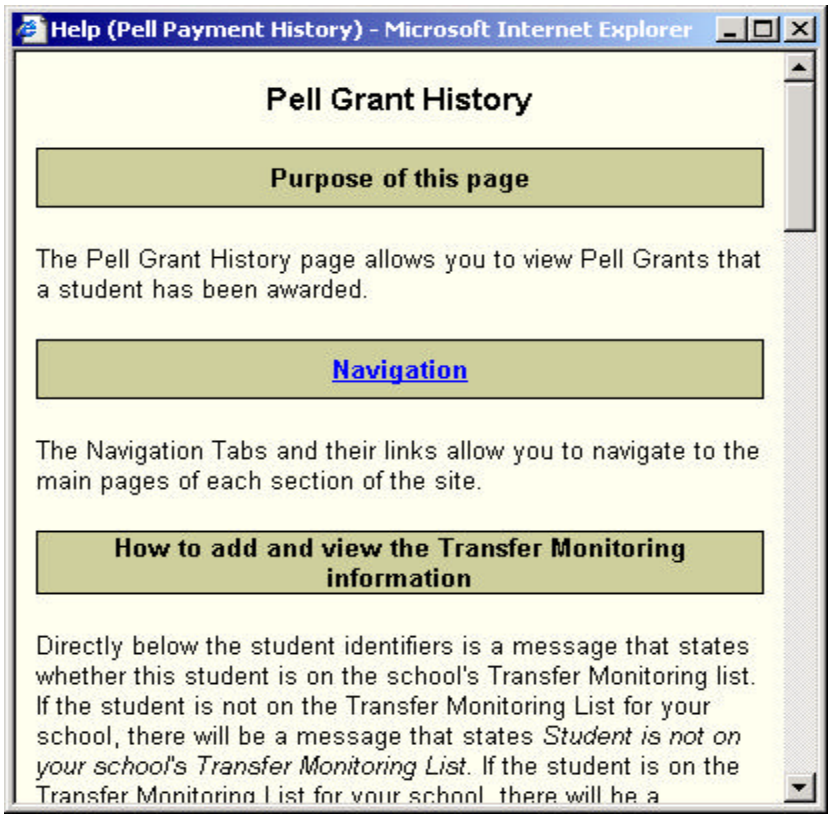


Figure 10, Help

1.3.1.10 Screen Name: Message Detail

Description	Displays the selected news or updates in detail for the user community.
Functional Area	This screen does not support any of the core NSLDS functions.
User Group	ED/FSA, Schools, Lenders, GAs, State Agencies
Reference	NSLDS User Documentation, Chapter 3.2.4 FAQ.
Comments	There were no requests to modify this screen.

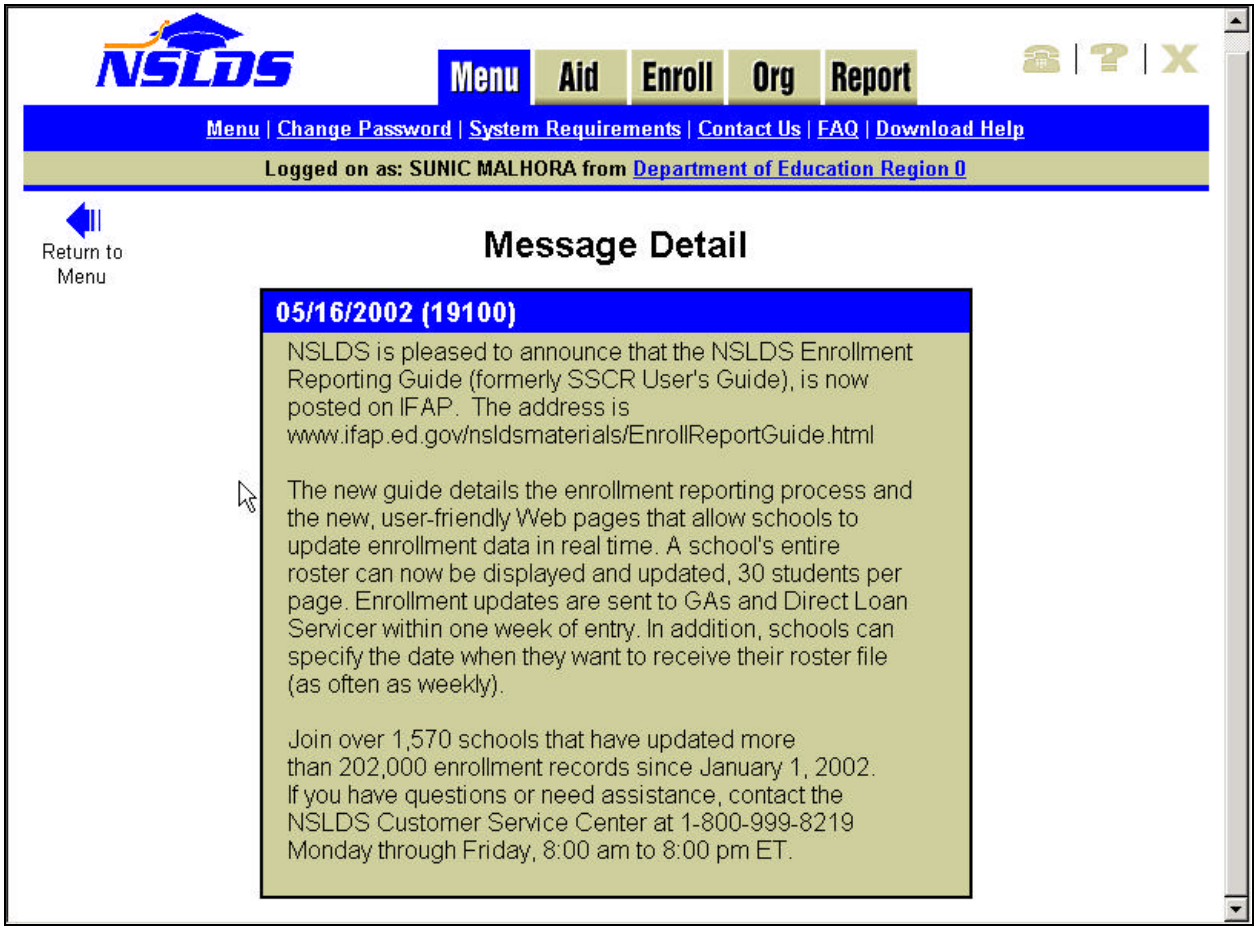


Figure 11, Message Detail

1.3.1.11 Screen Name: Security

Description	Provides information regarding website security.
Functional Area	This screen does not support any of the core NSLDS functions.
User Group	ED/FSA, Schools, Lenders, GAs, State Agencies

Reference	Raytheon personnel
Comments	There were no requests to modify this screen.

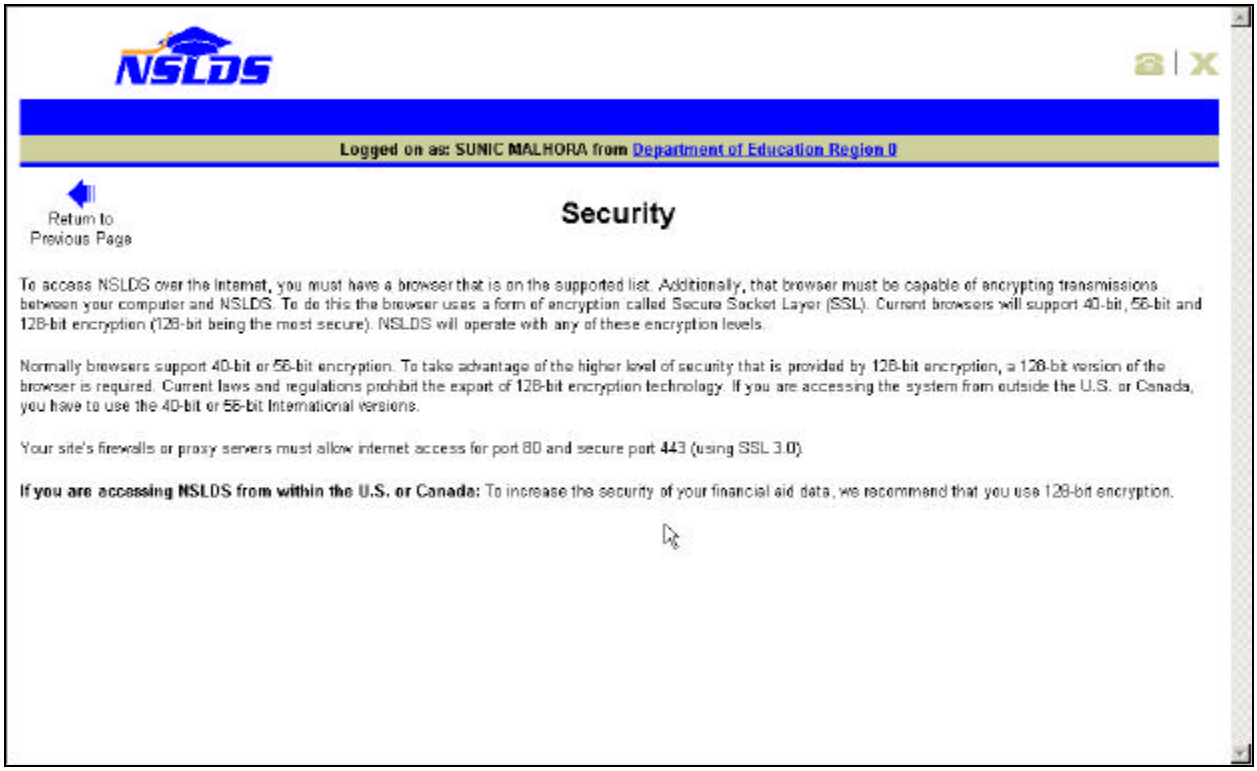


Figure 12, Security

1.3.2 Financial Aid

The Financial Aid pages allow a user to access or update a borrower's financial aid history. This includes searching for a particular borrower or viewing a borrower's loan information at a summary or detail level. The following screens can be accessed from the Aid tab.

1.3.2.1 Screen Name: Loan History

Description	Displays a borrower's Title IV Aggregate Loan Information and Loan Summary.
Functional Area	Student Aid Eligibility, Financial Aid History, Student Transfer Monitoring, Research and Policy Development
User Group	ED/FSA, Schools, State Agencies
Reference	NSLDS User Documentation, Chapter 3.4.1 Loan History
Comments	1. Ability to display the date/timestamp associated with each loan, as

	it is stored within NSLDS II.

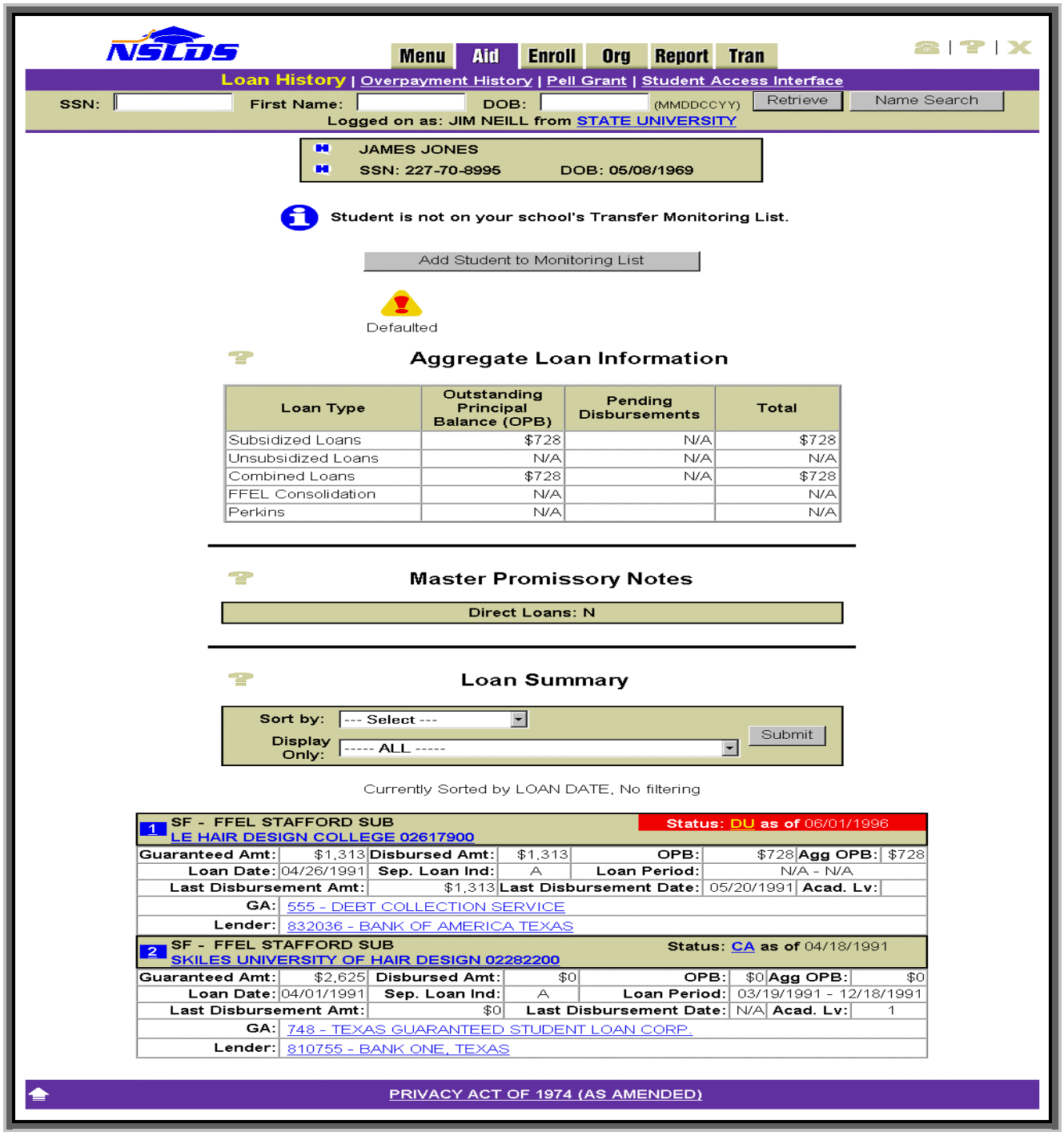


Figure 13, Loan History

1.3.2.2 Screen Name: Student/PLUS Borrower Name Search

Description	Allows a user to search for records in the NSLDS database by complete or partial name, rather than SSN. A user can search by first name, last name, first and last name, and by a partial or exact match type.
Functional Area	Financial Aid History, Student Transfer Monitoring, Research and Policy Development
User Group	ED/FSA
Reference	NSLDS User Documentation, Chapter 3.4.1.1 Student/PLUS Borrower Name Search
Comments	There were no requests to modify this screen.

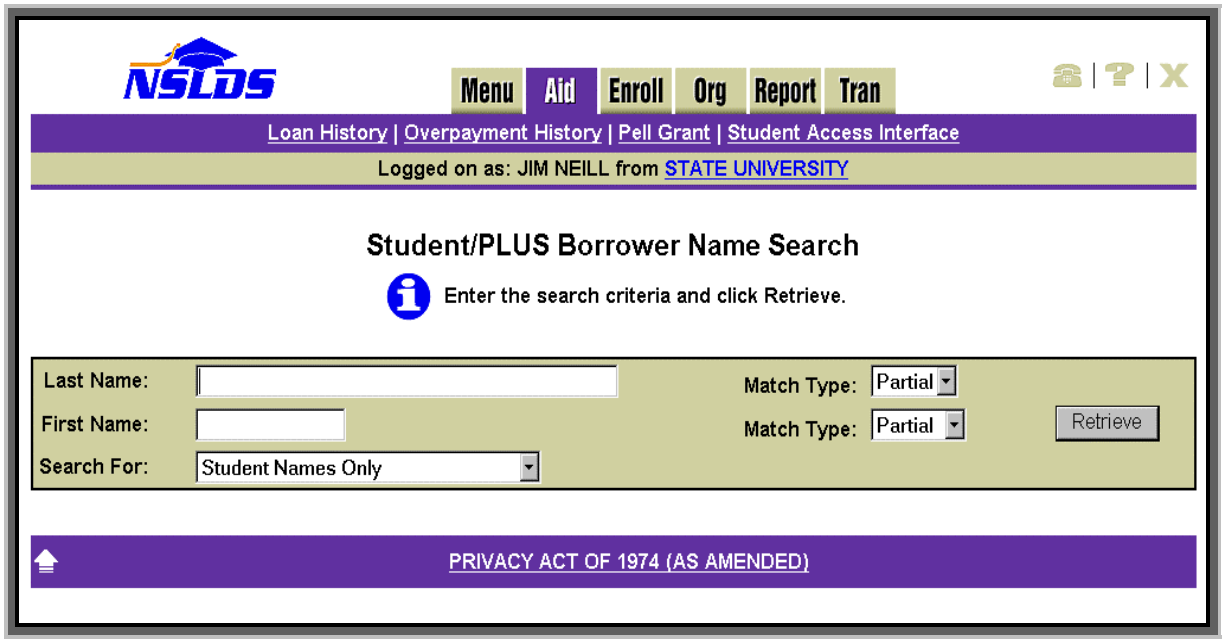


Figure 14, Student/PLUS Borrower Name Search

1.3.2.3 Screen Name: Borrower Name History

Description	Lists name changes for a borrower in the NSLDS database.
Functional Area	Financial Aid History, Student Transfer Monitoring, Research and Policy Development
User Group	ED/FSA, Schools, Lenders, GAs, State Agencies
Reference	NSLDS User Documentation, Chapter 3.4.1.2 Borrower Name History
Comments	There were no requests to modify this screen.

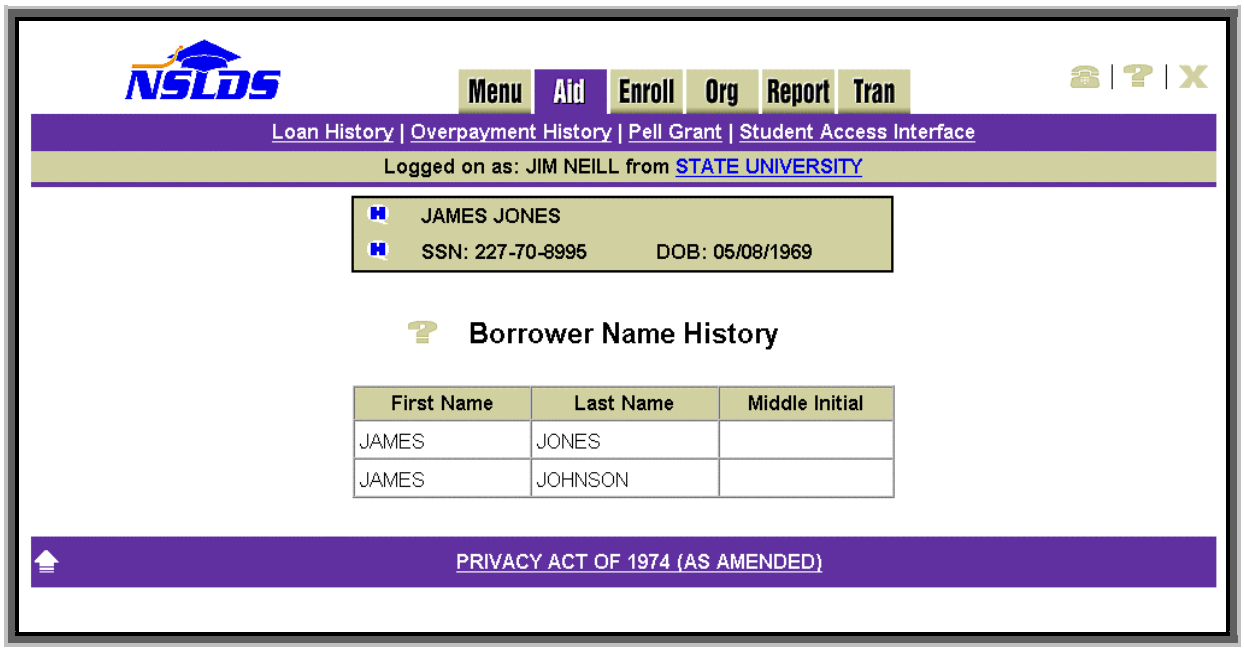


Figure 15, Borrower Name History

1.3.2.4 Screen Name: Borrower SSN History

Description	Lists any associated Social Security Numbers the borrower has been identified with in the past.
Functional Area	Financial Aid History, Student Transfer Monitoring, Research and Policy Development
User Group	ED/FSA, Schools, Lenders, GAs, State Agencies
Reference	NSLDS User Documentation, Chapter 3.4.1.2 Borrower Name History
Comments	There were no requests to modify this screen.

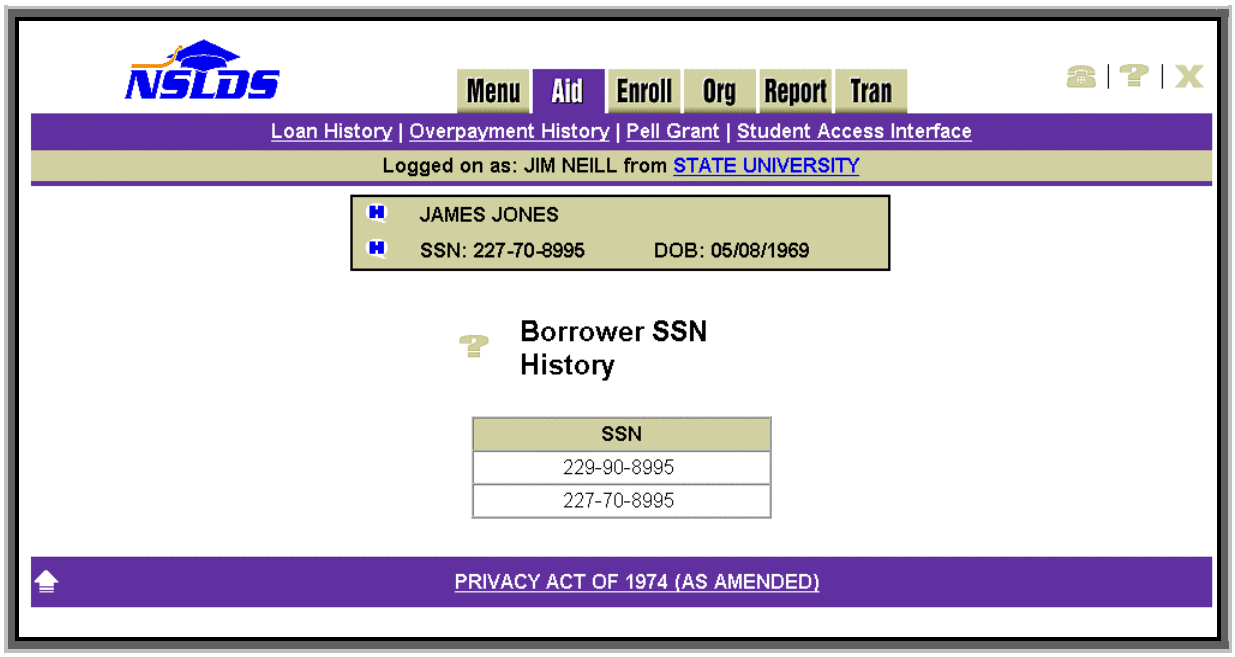


Figure 16, Borrower SSN History

1.3.2.5 Screen Name: Loan Detail

Description	Displays historical data for a particular loan, which includes, loan amounts, loan activity, loan status changes, and the GA, Lender, and/or Servicer history.
Functional Area	Student Aid Eligibility, Financial Aid History, Loan Transfer Tracking, Research and Policy Development
User Group	ED/FSA, Schools, Lenders, GAs, State Agencies
Reference	NSLDS User Documentation, Chapter 3.4.1.4 Loan Detail
Comments	There were no requests to modify this screen.

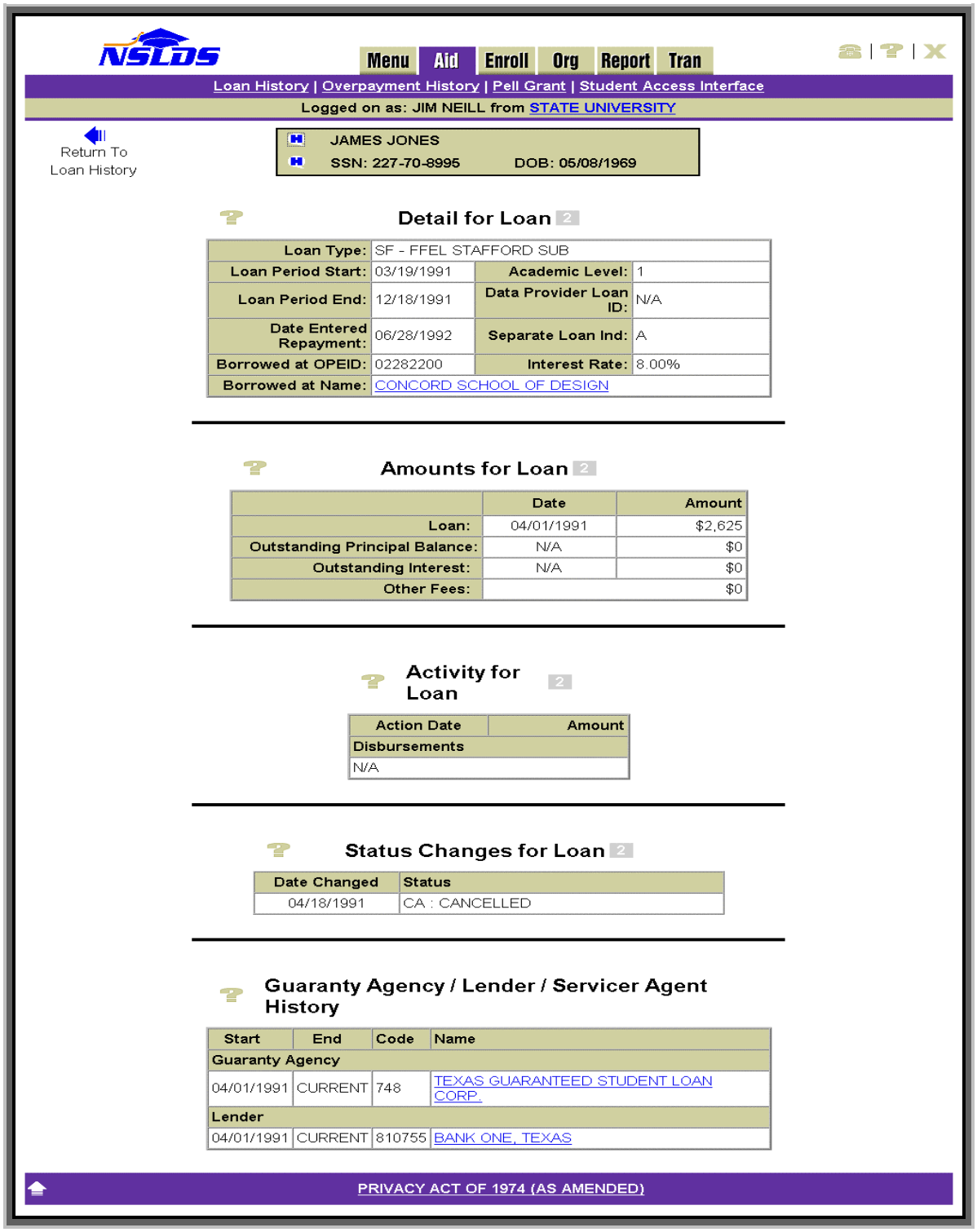


Figure 17, Loan Detail

1.3.2.6 Screen Name: Overpayment History List

Description	Displays the overpayments reported to NSLDS for a student. The Overpayment History page summarizes past and present Perkins loan, Supplemental Educational Opportunity Grant (SEOG), and Pell grant overpayments for students. A user will also have the ability to add overpayment history information for a student from this screen. Once the overpayment information has been added, the user will receive a confirmation notifying them the overpayment was successfully added.
Functional Area	Student Aid Eligibility, Financial Aid History, Payment Reasonability, Research and Policy Development
User Group	ED/FSA, Schools, Lenders, GAs, State Agencies
Reference	NSLDS User Documentation, Chapter 3.4.1 Overpayment History
Comments	There were no requests to modify this screen.

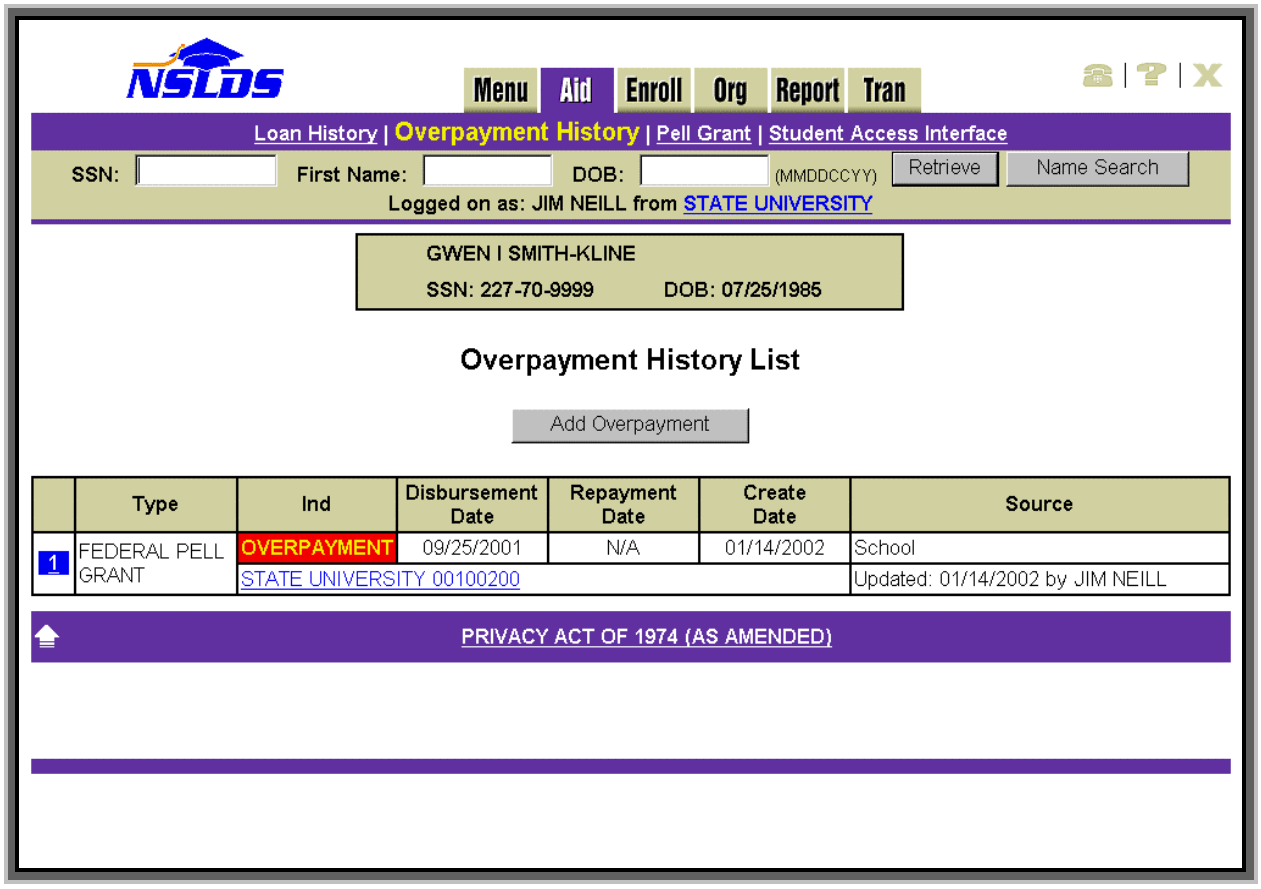


Figure 18, Overpayment History List

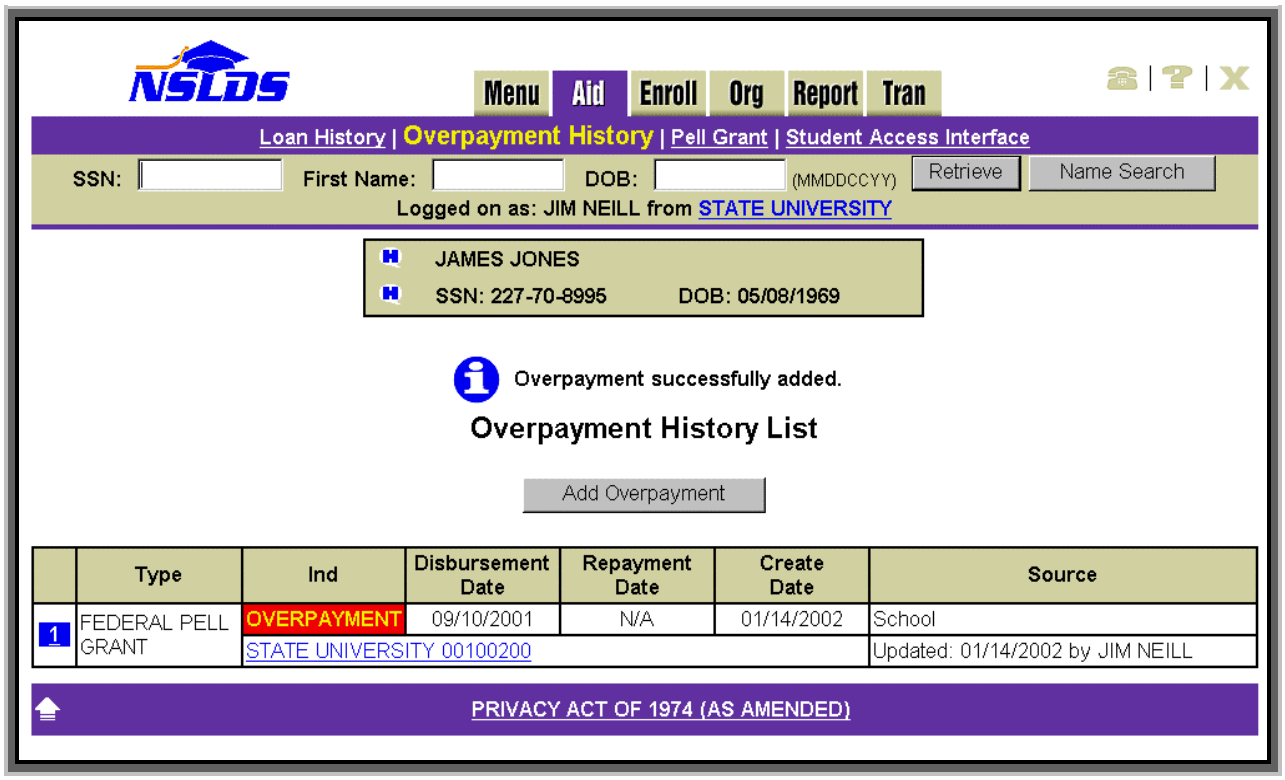


Figure 19, Overpayment History after Add

1.3.2.7 Screen Name: Overpayment Add

Description	Allows a user to enter student identifier and overpayment information for a student who owes an overpayment on a Title IV grant or a Perkins loan.
Functional Area	Student Aid Eligibility, Financial Aid History
User Group	ED/FSA
Reference	NSLDS User Documentation, Chapter 3.4.2.1 Overpayment Add
Comments	There were no requests to modify this screen.

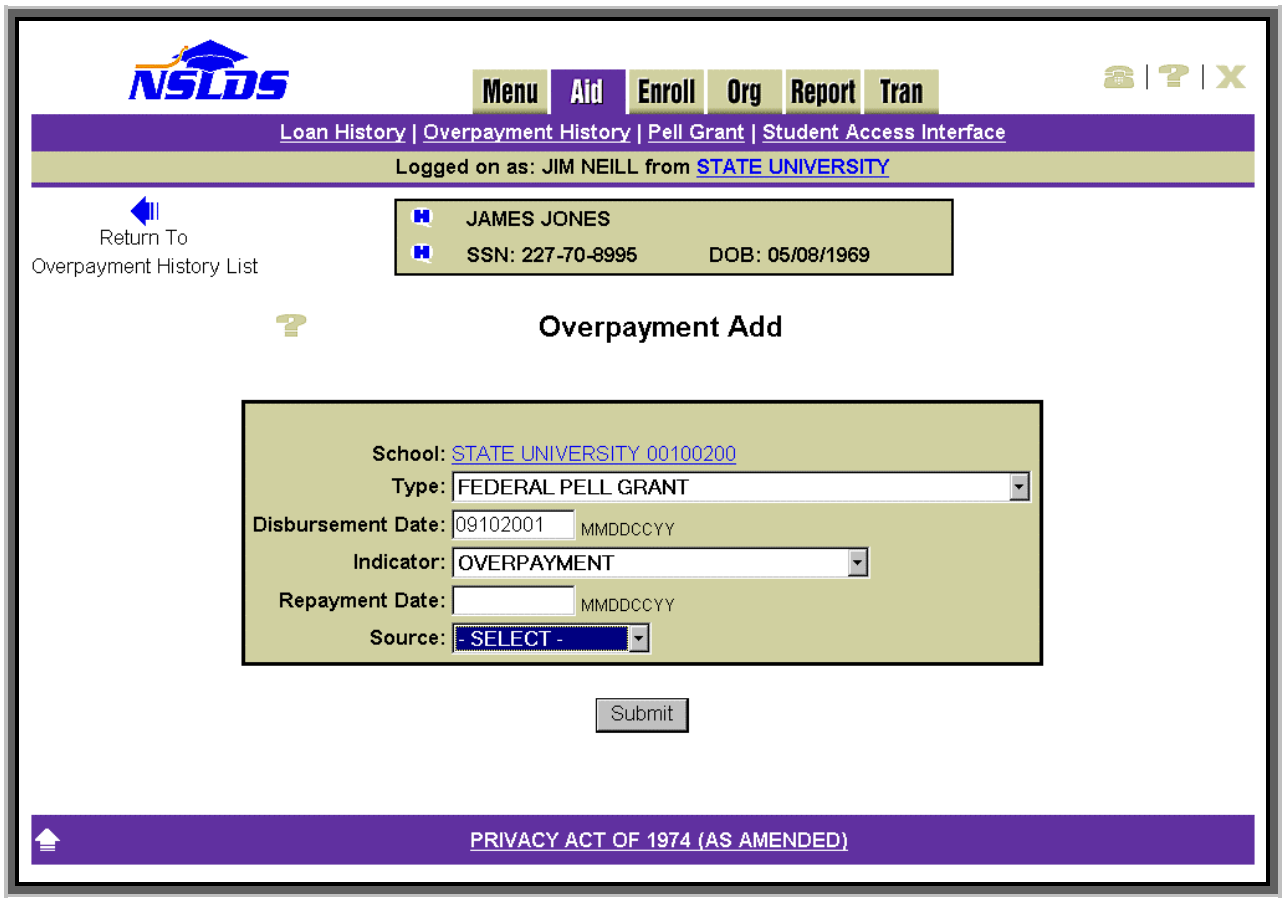


Figure 20, Overpayment Add

1.3.2.8 Screen Name: Overpayment Add and Student Add

Description	Allows a user to enter student identifier and overpayment information for a student who owes an overpayment on a Title IV grant or a Perkins loan.
Functional Area	Student Aid Eligibility, Financial Aid History
User Group	ED/FSA
Reference	NSLDS User Documentation, Chapter 3.4.2.2 Overpayment Add and Student Add
Comments	There were no requests to modify this screen.

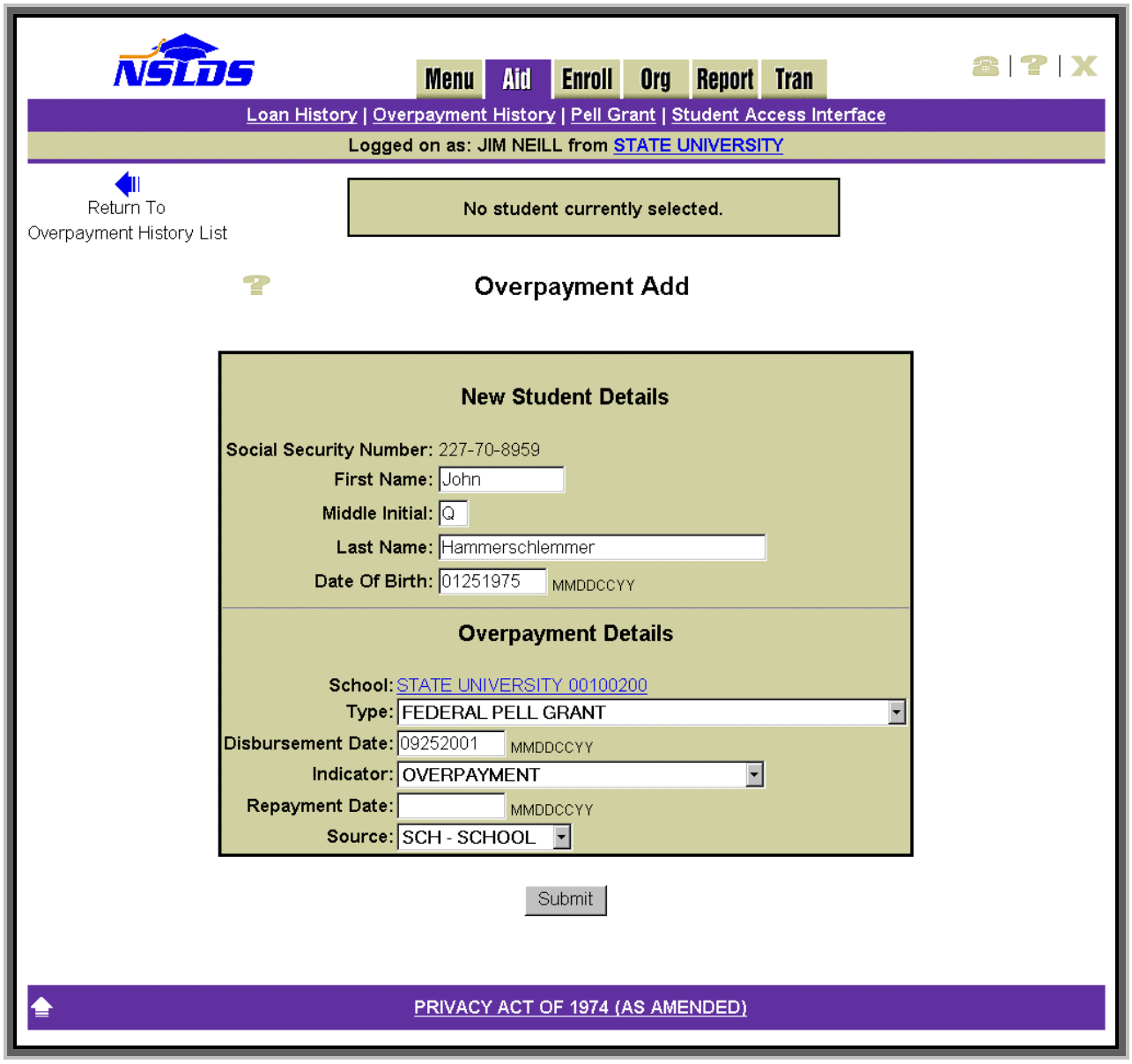


Figure 21, Overpayment Add and Student Add

1.3.2.9 Screen Name: Overpayment Display

Description	Allows a user to update or delete an overpayment listed on the Overpayment History page. A user will also be able to update or delete overpayment information from this screen.
Functional Area	Student Aid Eligibility, Financial Aid History
User Group	ED/FSA, Schools, Lenders, GAs, State Agencies

Reference	NSLDS User Documentation, Chapter 3.4.2.3 Overpayment Display
Comments	There were no requests to modify this screen.

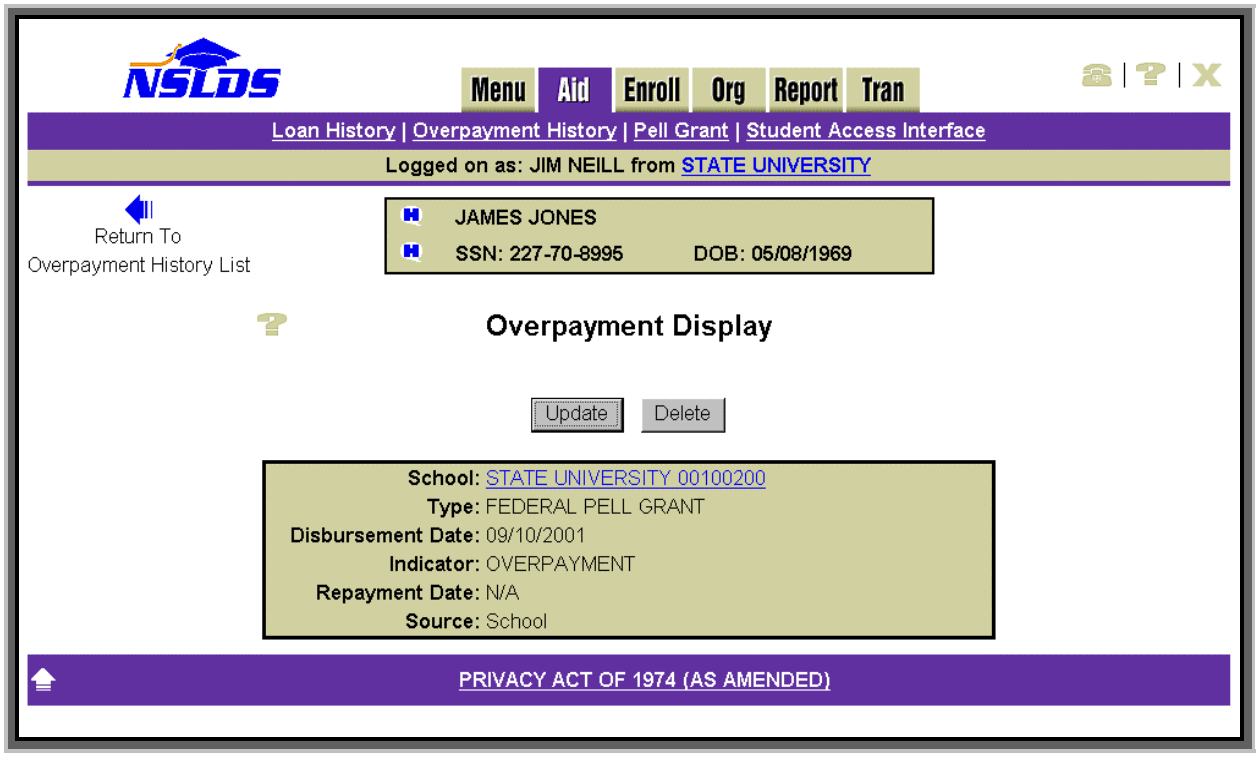


Figure 22, Overpayment Display

1.3.2.10 Screen Name: Overpayment Update

Description	Allows a user to update the overpayment information for a student.
Functional Area	Student Aid Eligibility, Financial Aid History
User Group	ED/FSA, Schools
Reference	NSLDS User Documentation, Chapter 3.4.3.1 Overpayment Update
Comments	There were no requests to modify this screen.

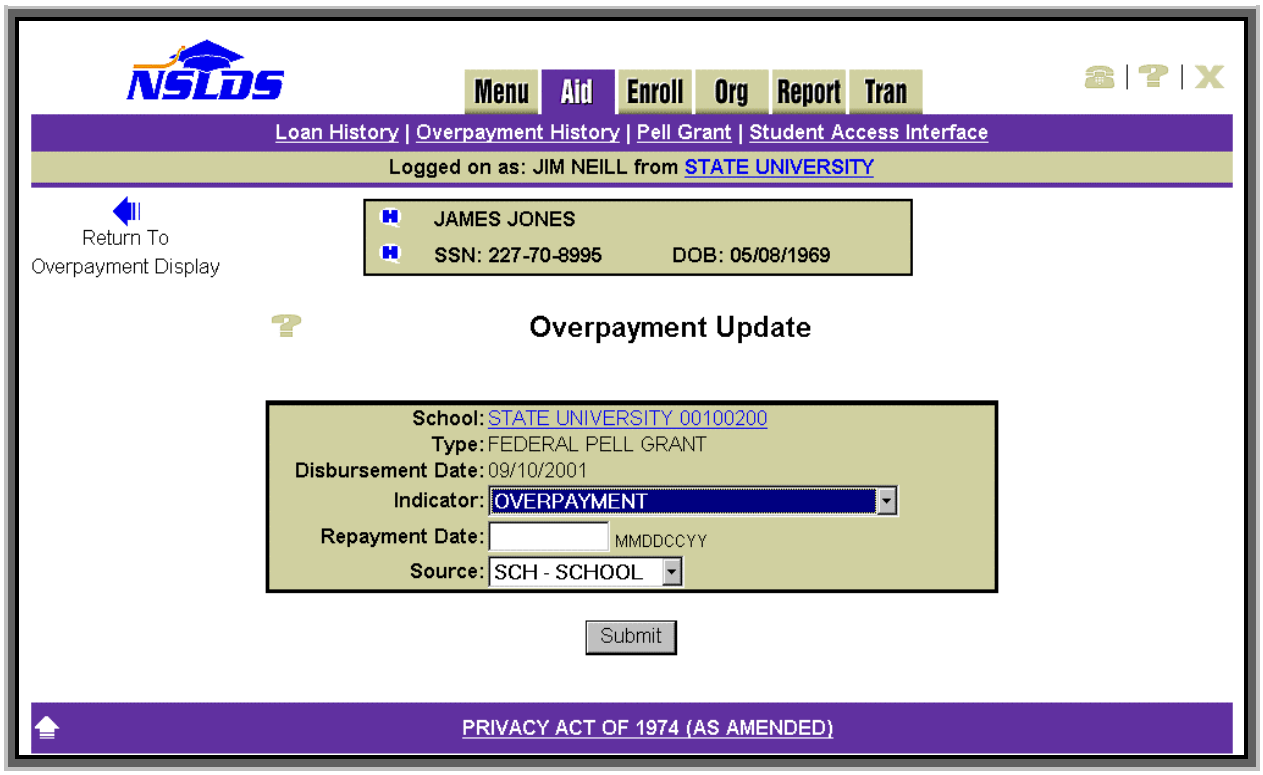


Figure 23, Overpayment Update

1.3.2.11 Screen Name: Overpayment Delete Confirmation

Description	Allows a user to delete an overpayment when the overpayment has been entered in error.
Functional Area	Student Aid Eligibility, Financial Aid History
User Group	ED/FSA, Schools
Reference	NSLDS User Documentation, Chapter 3.4.3.2 Overpayment Delete Confirmation
Comments	There were no requests to modify this screen.

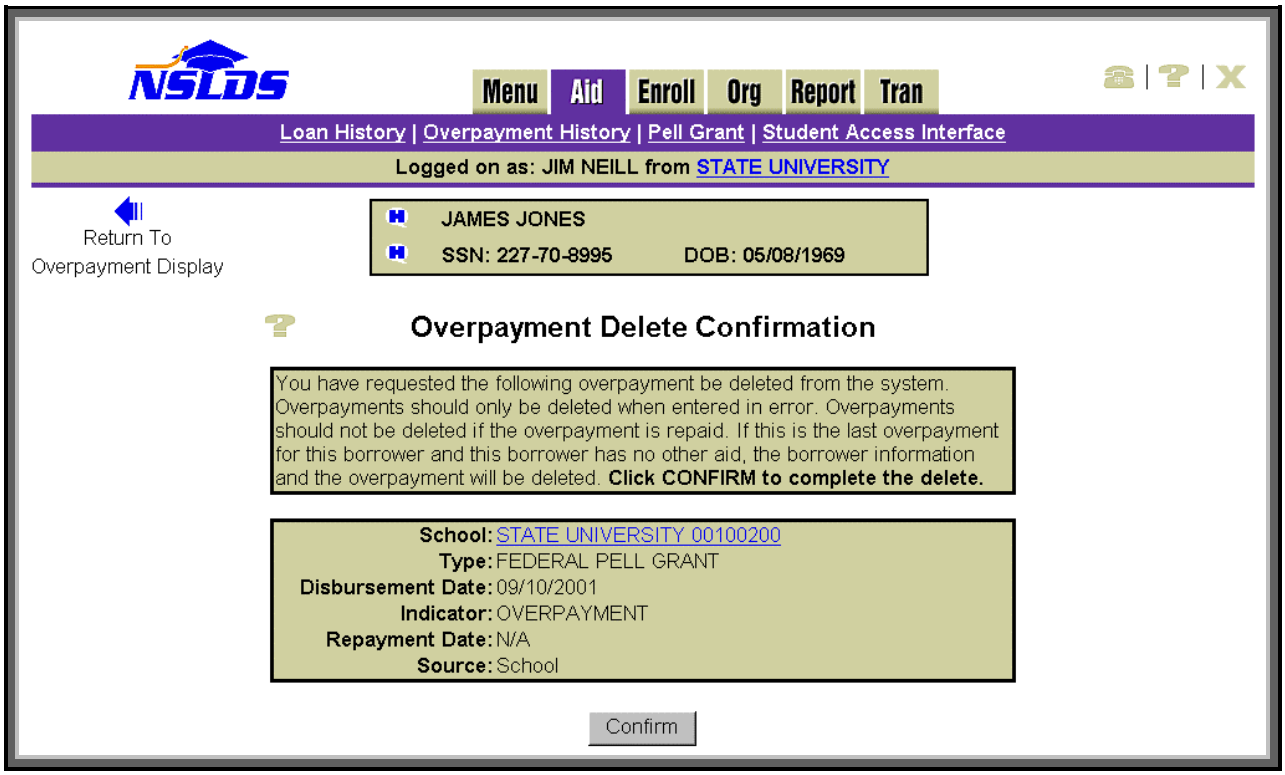


Figure 24, Overpayment Delete Confirmation

1.3.2.12 Screen Name: Pell Grant History

Description	Allows a user to view Pell grants that a student has been awarded.
Functional Area	Financial Aid History, Research and Policy Development
User Group	ED/FSA, Schools
Reference	NSLDS User Documentation, Chapter 3.4.3 Pell Grant History
Comments	1. Ability for a user to view the date a borrower attended a specific school. This enhancement requirement is currently under FSA review and may be implemented by Raytheon before development for NSLDS II occurs by Modernization Partner.

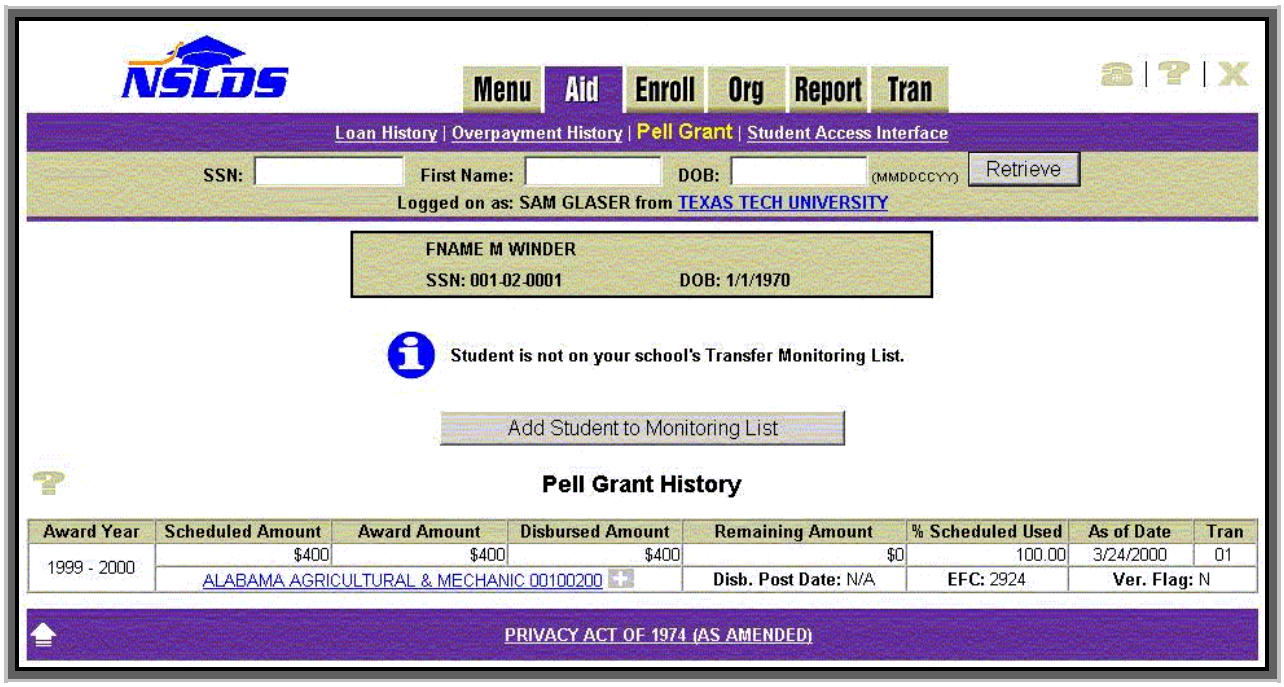


Figure 25, Pell Grant History with Add Button

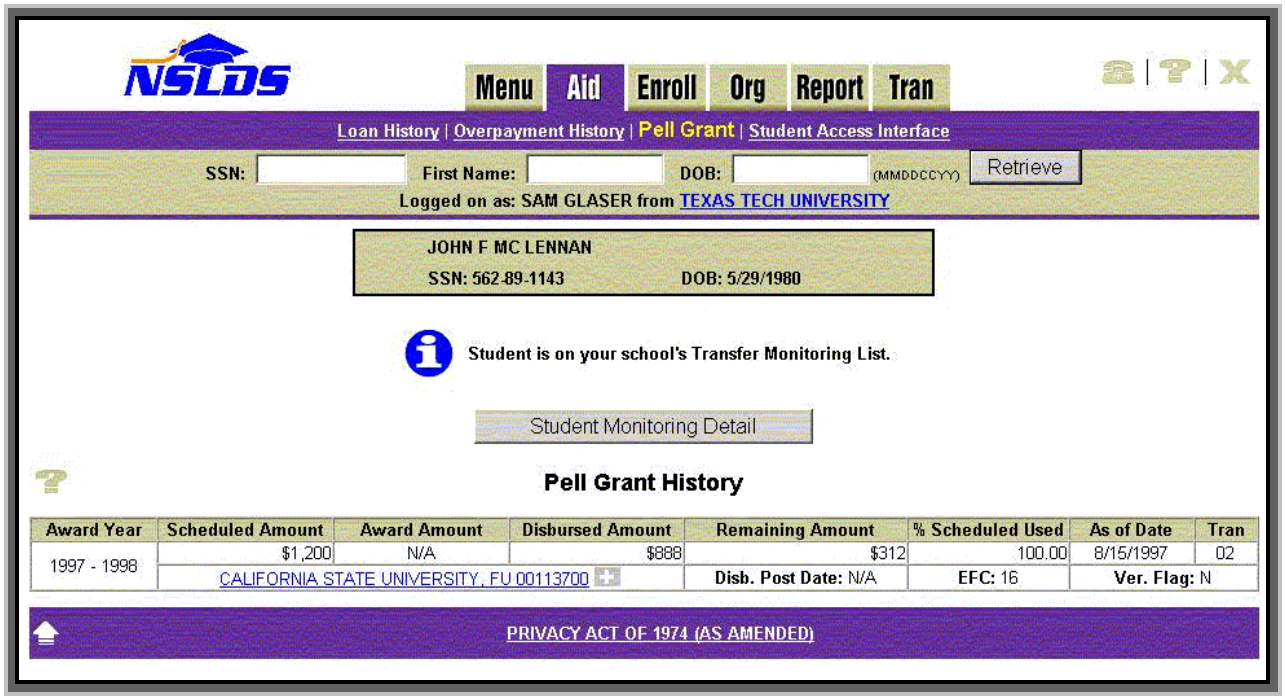


Figure 26, Pell Grant History with Detail Button

1.3.2.13 Screen Name: Student Access Interface

Description	Links the FAP website to the SAFAR website. This allows a user to view the borrower's financial aid records as the borrower would view them.
Functional Area	Financial Aid History
User Group	ED/FSA, Schools
Reference	NSLDS User Documentation, Chapter 3.4.4 Student Access Interface
Comments	There were no requests to modify this screen.

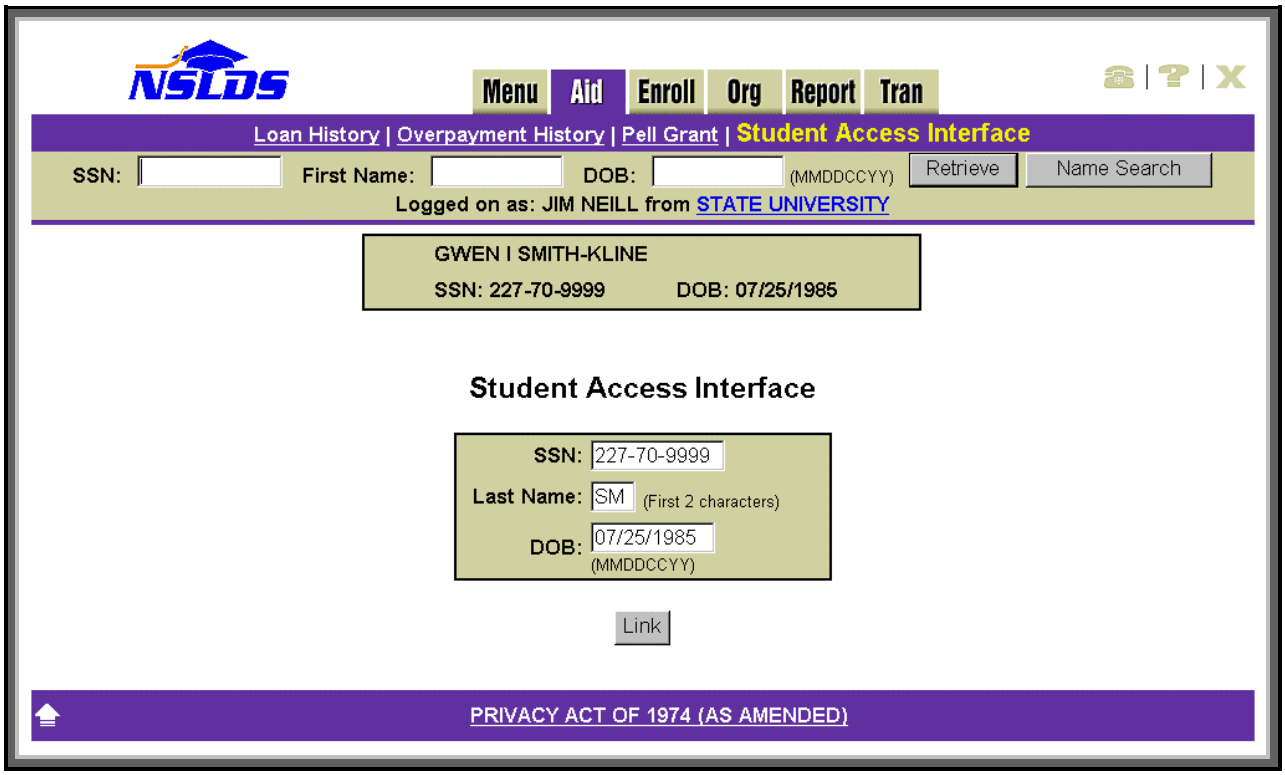


Figure 27, Student Access Interface

1.3.3 Enrollment

The Enrollment pages allow a user to access or update enrollment information for a specific borrower or school. This includes allowing schools to set their enrollment reporting schedule, viewing their enrollment roster information, and viewing a borrower's enrollment information at a summary or detail level. The following screens can be accessed from the Enrollment tab.

1.3.3.1 Screen Name: Enrollment Summary

Description	Provides an overview of a student's most recent status at every school where enrollment has been reported for that student.
Functional Area	Enrollment Tracking, Research and Policy Development
User Group	ED/FSA, Schools, Lenders, GAs, State Agencies
Reference	NSLDS User Documentation, Chapter 3.5.2 Enrollment Summary
Comments	There were no requests to modify this screen.

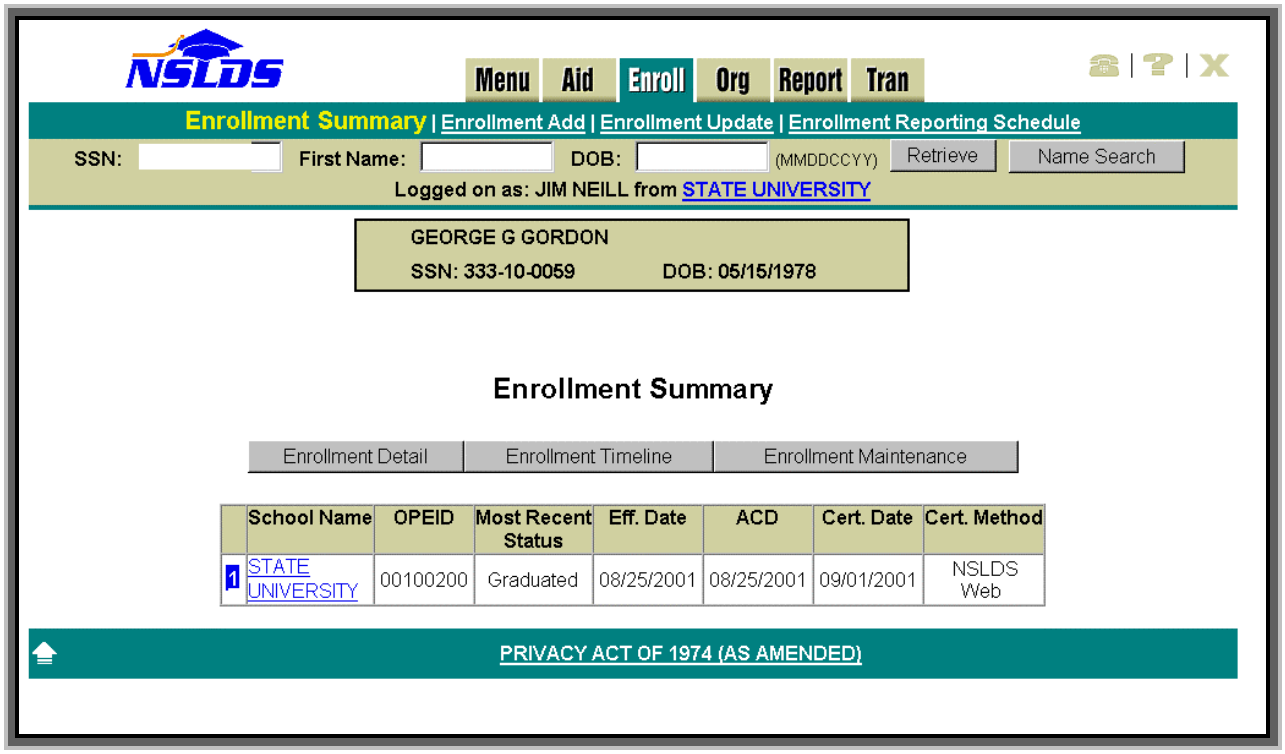


Figure 28, Enrollment Summary

1.3.3.2 Screen Name: Enrollment Detail

Description	Displays a detailed history of a student's enrollment status at one or more schools.
Functional Area	Enrollment Tracking, Research and Policy Development
User Group	ED/FSA, Schools, Lenders, GAs, State Agencies
Reference	NSLDS User Documentation, Chapter 3.5.2.1 Enrollment Detail
Comments	There were no requests to modify this screen.

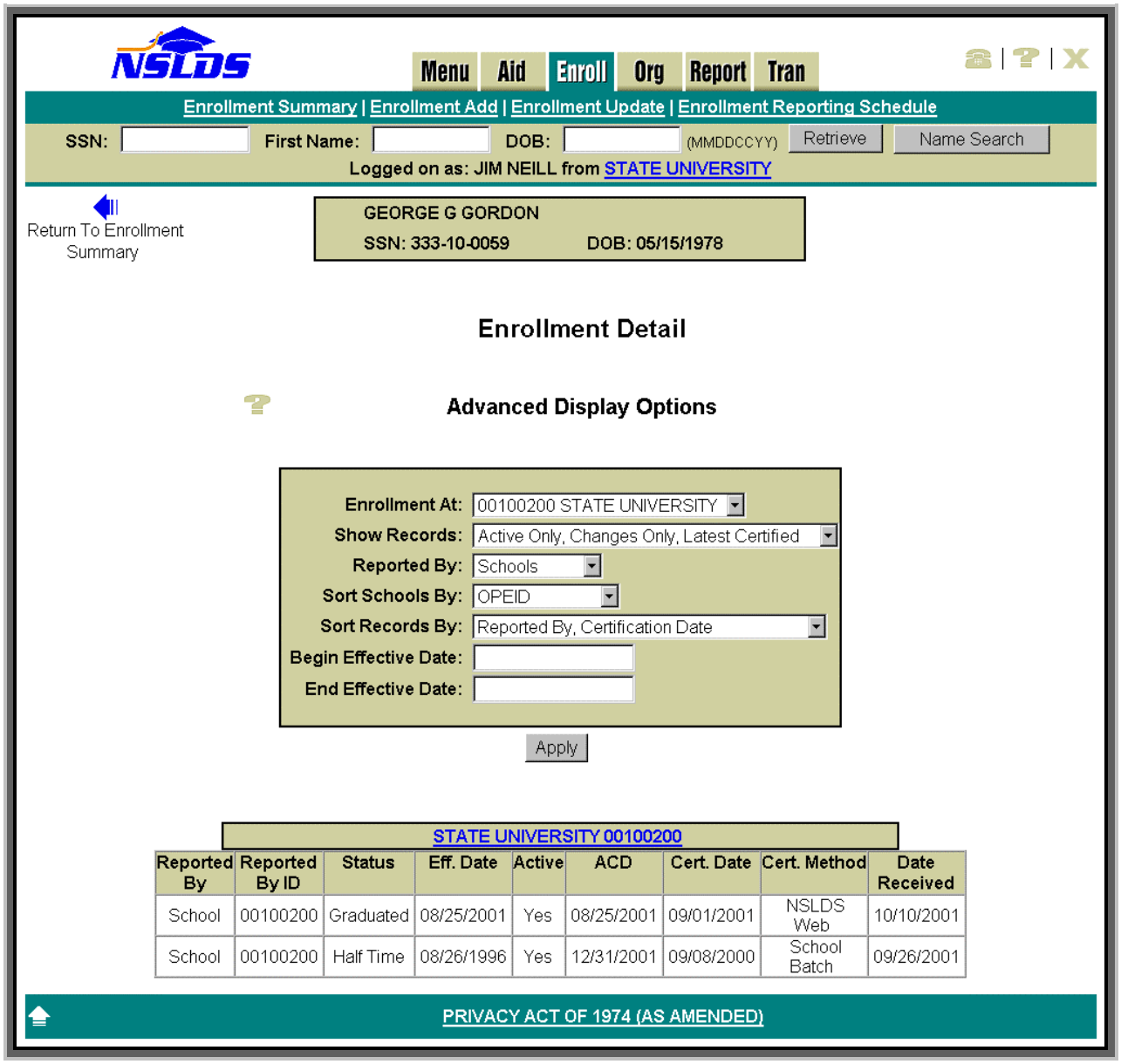


Figure 29, Enrollment Detail

1.3.3.3 Screen Name: Enrollment Timeline

Description	Displays a chronological view of a student's enrollment history. This page is intended to help users, especially lenders, see all of a student's enrollment statuses at a given time in the past and how long those statuses remained in effect.
Functional Area	Enrollment Tracking

User Group	ED/FSA, Schools, Lenders, GAs, State Agencies
Reference	NSLDS User Documentation, Chapter 3.5.2.2 Enrollment Timeline
Comments	There were no requests to modify this screen.

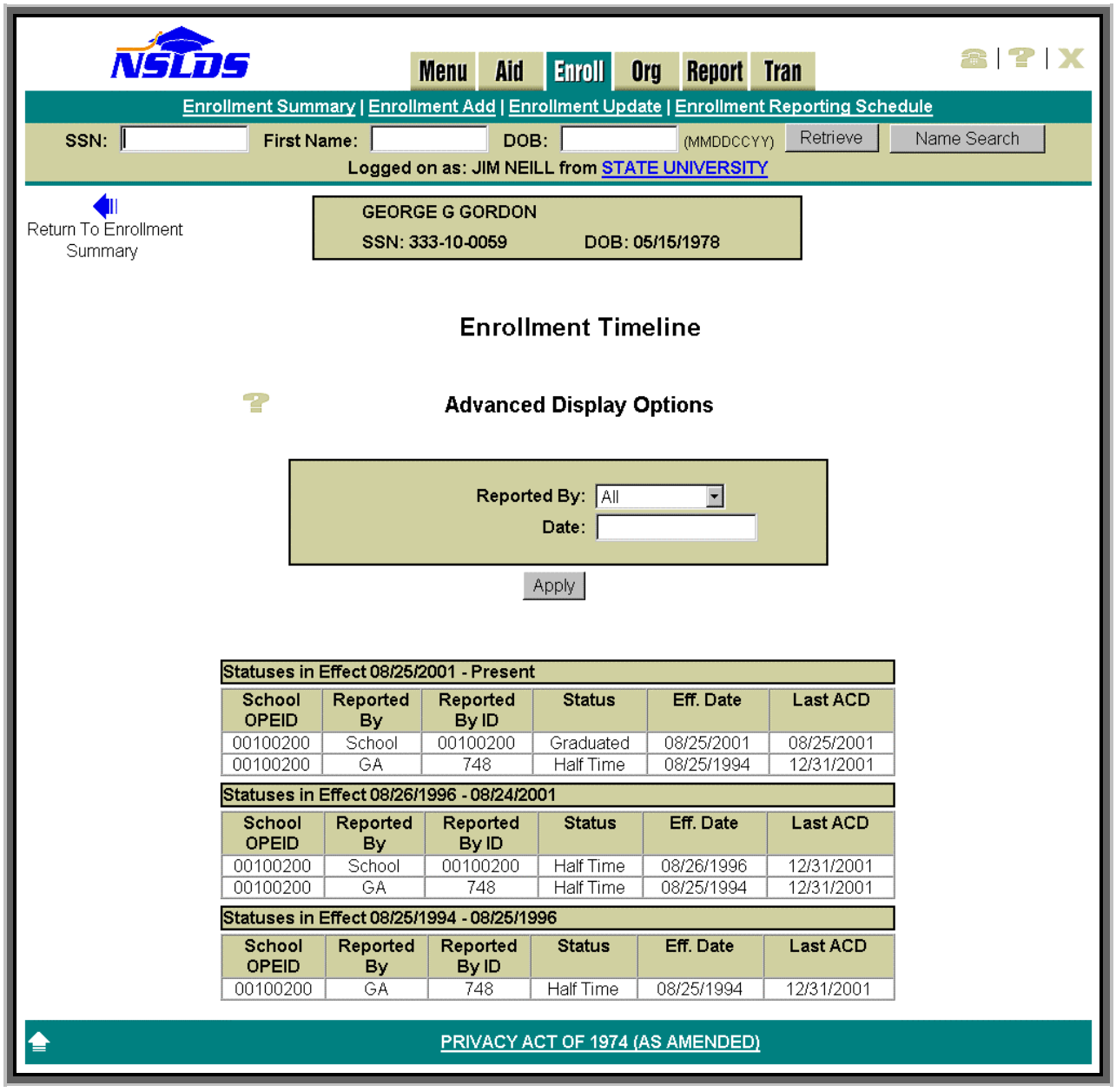


Figure 30, Enrollment Timeline

1.3.3.4 Screen Name: Enrollment Maintenance

Description	Allows school users to update the enrollment information for students attending their school. A user will be asked to confirm the enrollment information before submittal.
Functional Area	Enrollment Tracking
User Group	ED/FSA, Schools
Reference	NSLDS User Documentation, Chapter 3.5.2.3 Enrollment Maintenance
Comments	There were no requests to modify this screen.

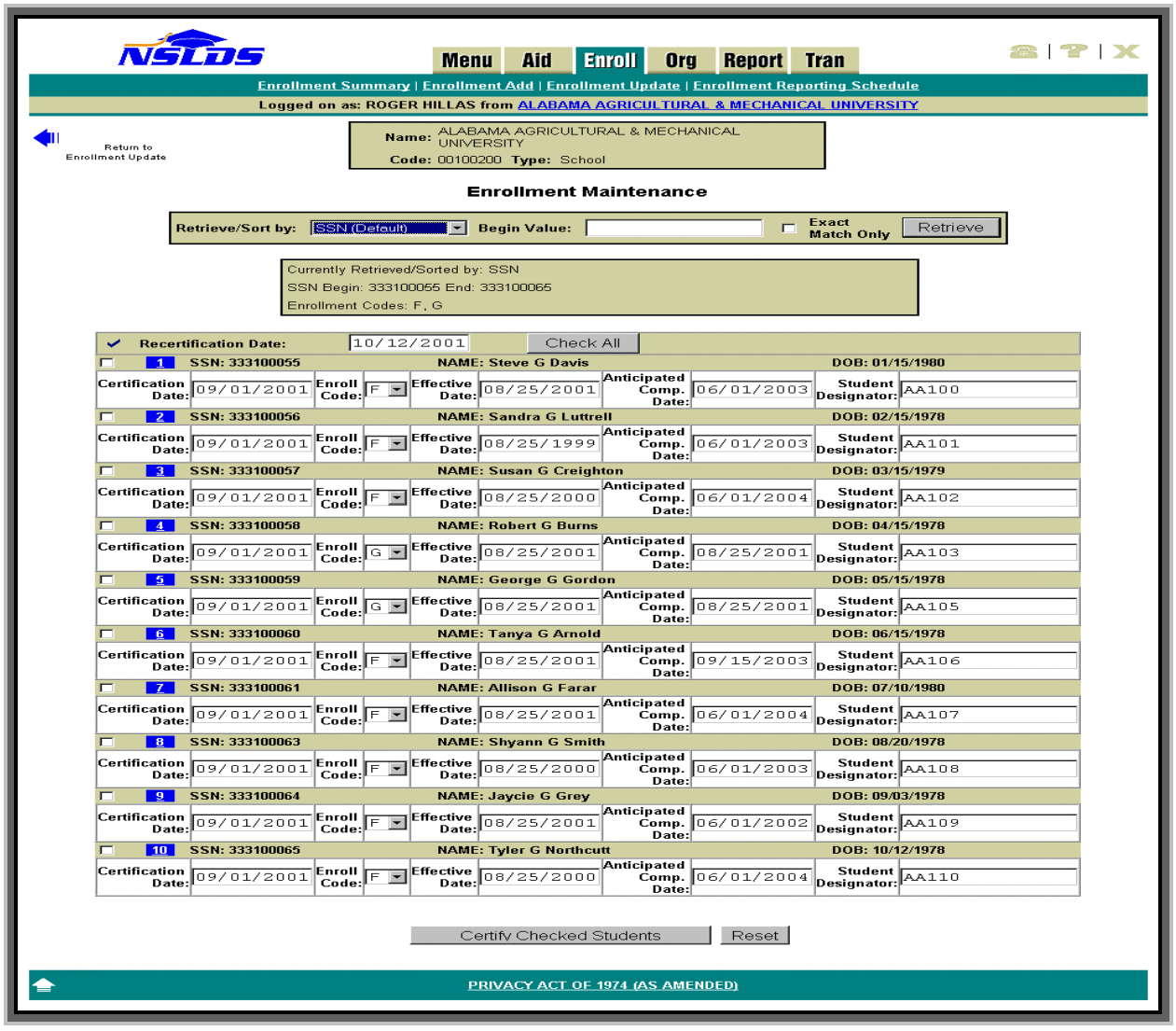


Figure 31, Enrollment Maintenance

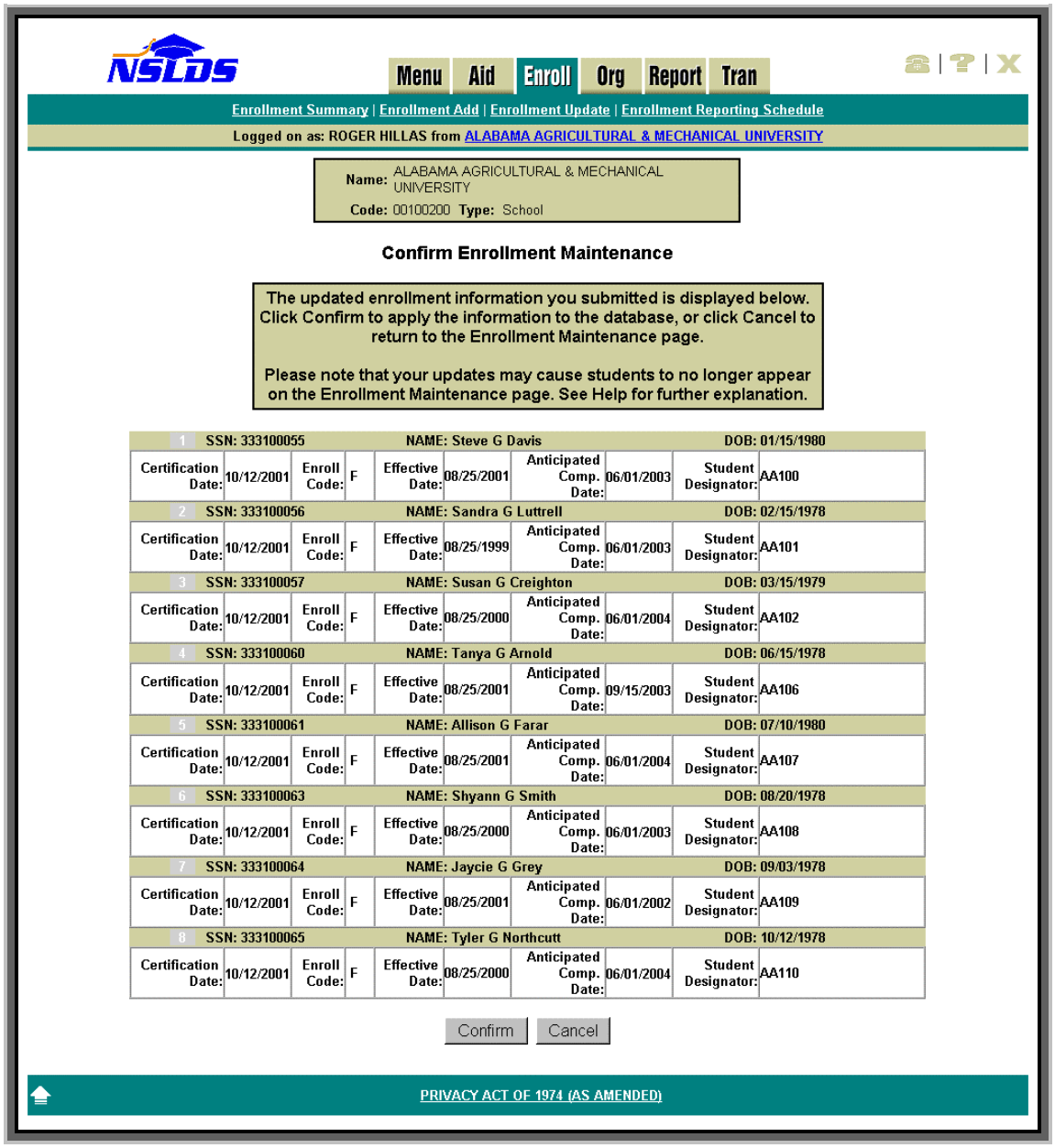


Figure 32, Enrollment Maintenance Confirm

1.3.3.5 Screen Name: Enrollment Add

Description	Allows school users to retrieve student records, so they can update enrollment information for those students on the Enrollment Maintenance page.
Functional Area	Enrollment Tracking

User Group	ED / FSA, Schools
Reference	NSLDS User Documentation, Chapter 3.5.3 Enrollment Add
Comments	There were no requests to modify this screen.

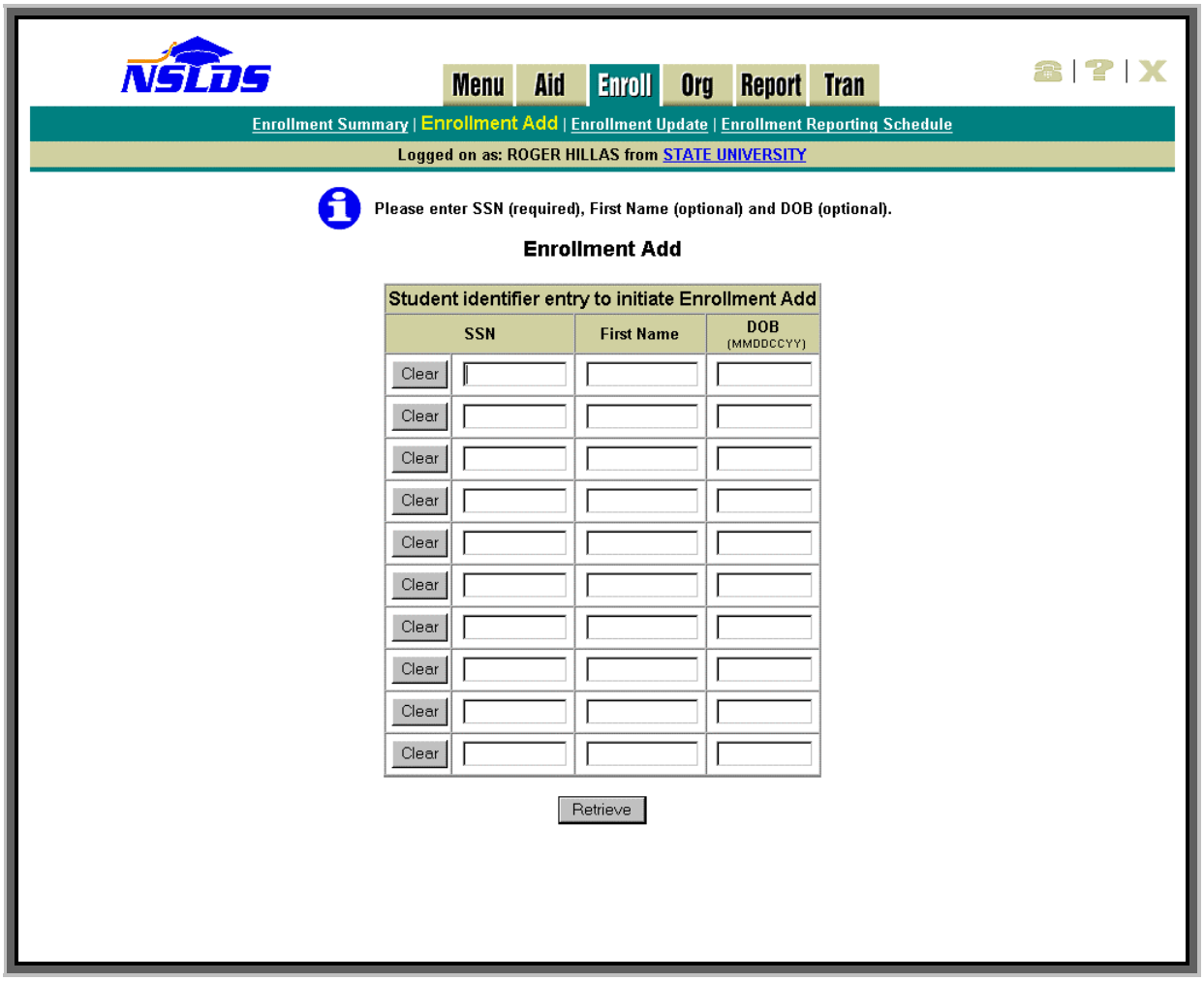


Figure 33, Enrollment Add

1.3.3.6 Screen Name: Enrollment Update

Description	Allows school users to retrieve enrollment information for students attending their school so they can update that information on the Enrollment Maintenance page.
Functional Area	Enrollment Tracking
User Group	ED / FSA, Schools
Reference	NSLDS User Documentation, Chapter 3.5.4 Enrollment Update

Comments	There were no requests to modify this screen.

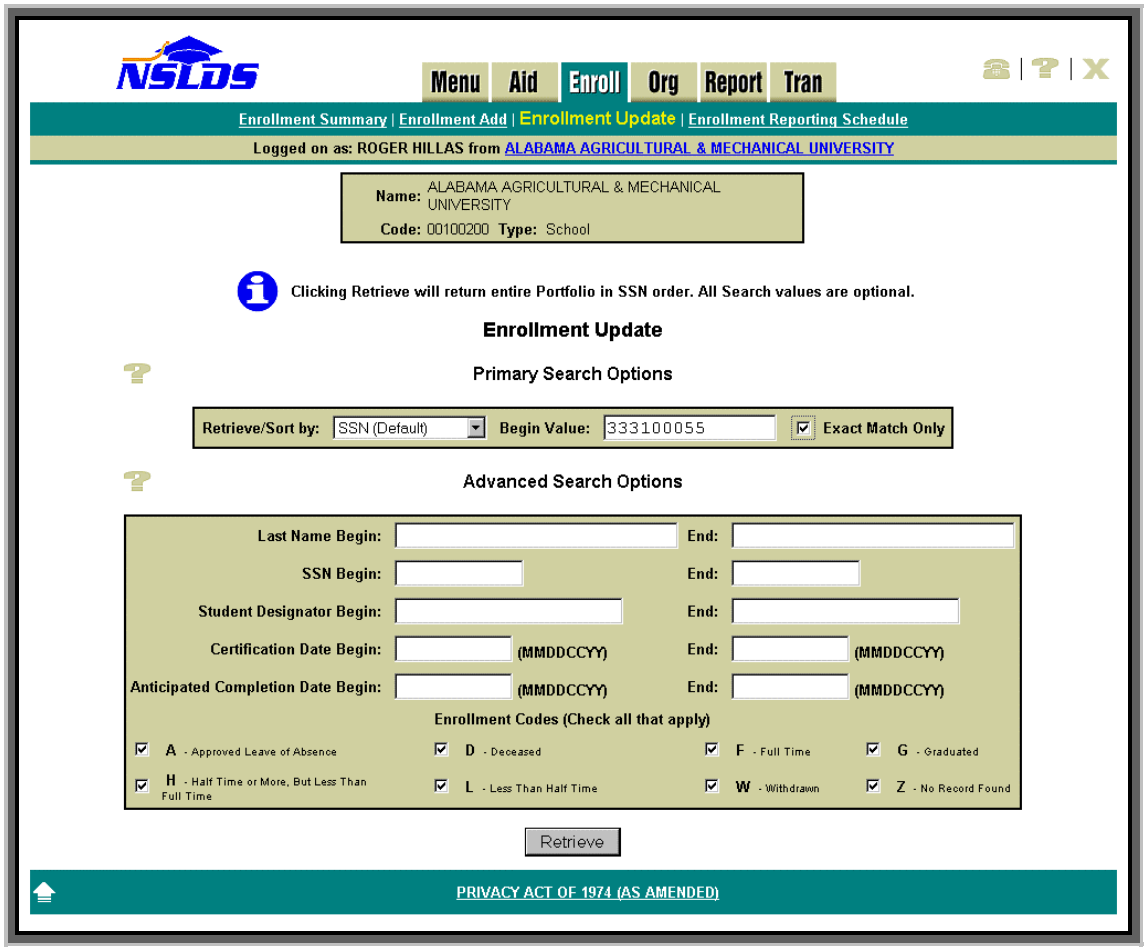


Figure 34, Enrollment Update

1.3.3.7 Screen Name: Enrollment Reporting Schedule

Description	Displays a user profile as well as current and past schedules for organizations that report or receive information about the enrollment status of students receiving federal student aid. The current schedule extends one year into the future. The past schedule extends one year into the past.
Functional Area	Enrollment Tracking
User Group	ED/FSA, Schools, Lenders, GAs
Reference	NSLDS User Documentation, Chapter 3.5.5 Enrollment Reporting Schedule
Comments	There were no requests to modify this screen.

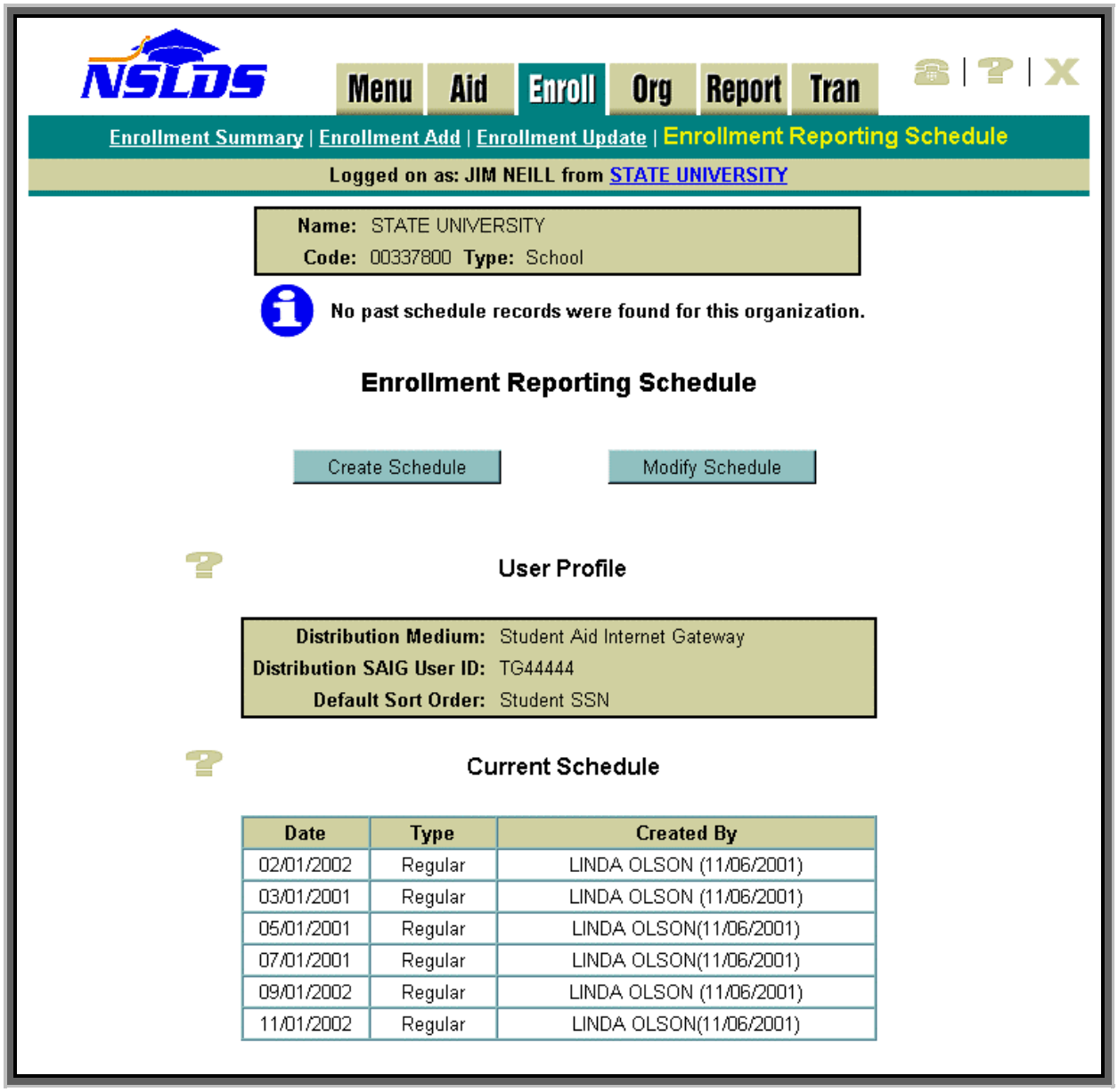


Figure 35, Enrollment Reporting Schedule

1.3.3.8 Screen Name: Enrollment Reporting Schedule Create

Description	Allows a user to create a new schedule for their organization to receive enrollment status files from the NSLDS.
Functional Area	Enrollment Tracking
User Group	ED/FSA, Schools, Lenders, GAs

Reference	NSLDS User Documentation, Chapter 3.5.5.1 Enrollment Reporting Schedule Create
Comments	There were no requests to modify this screen.

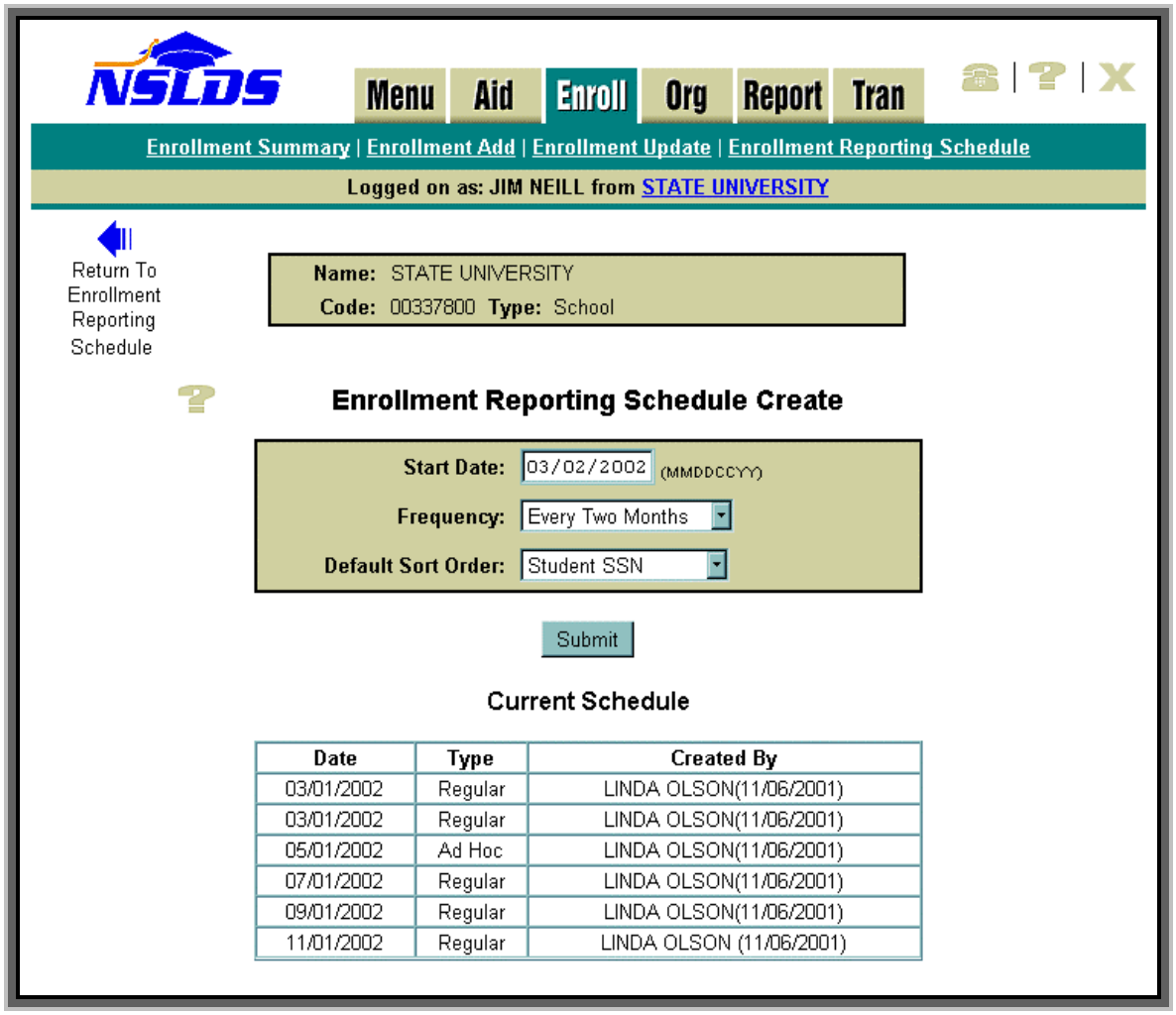


Figure 36, Enrollment Reporting Schedule Create

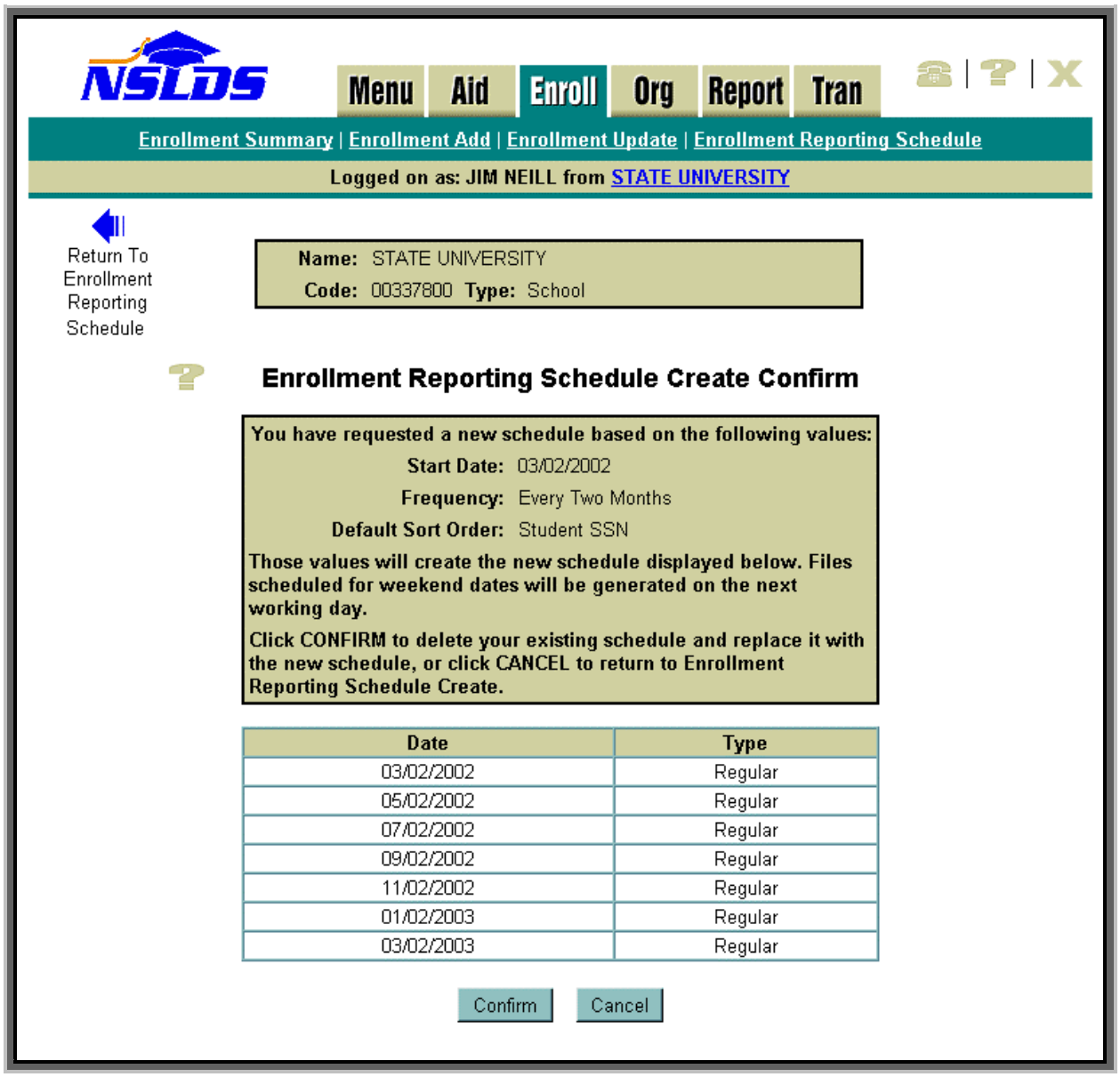


Figure 37, Enrollment Reporting Schedule Create Confirm

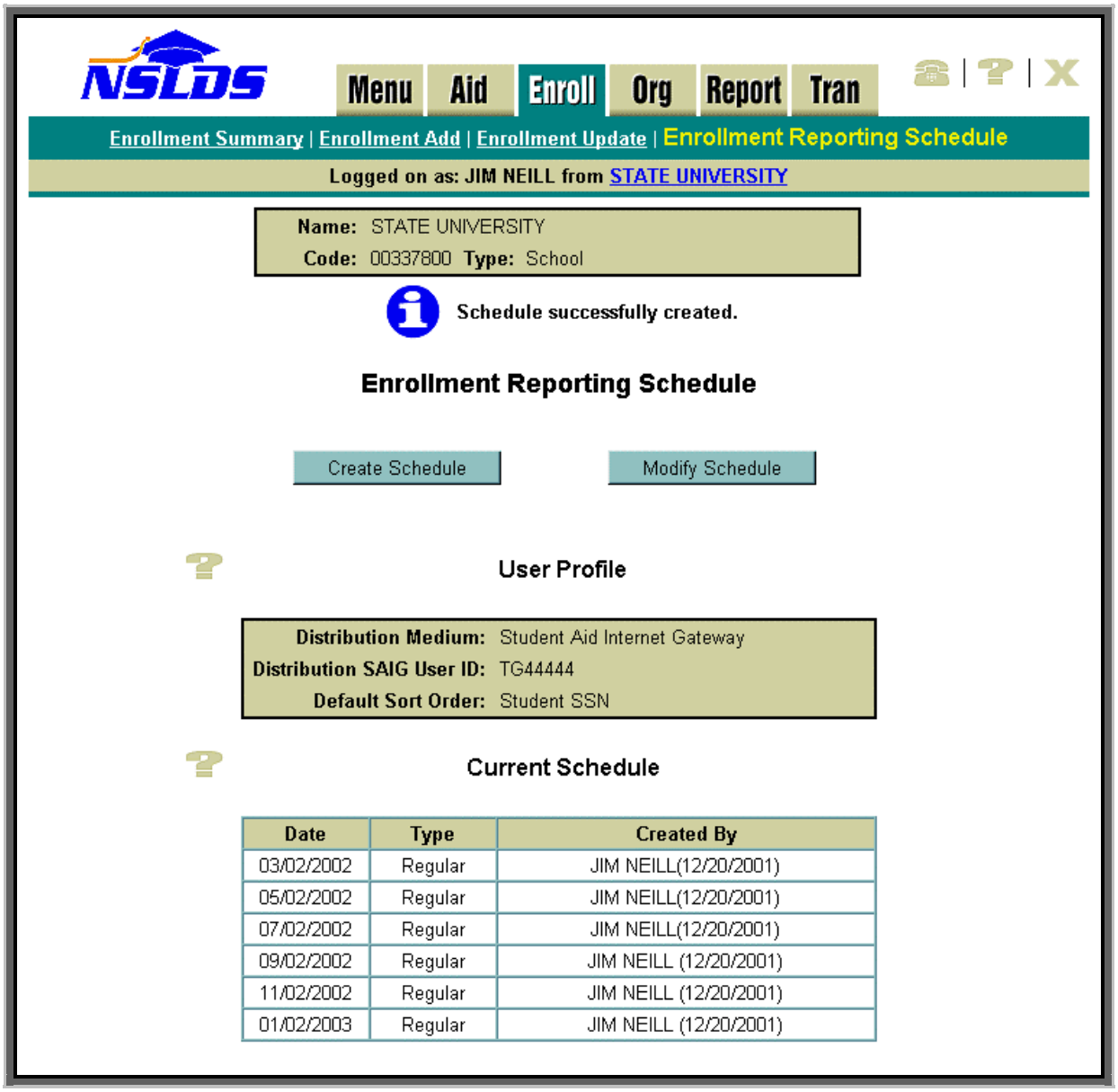


Figure 38, Enrollment Reporting Schedule Create After Confirm

1.3.3.9 Screen Name: Enrollment Reporting Schedule Modify

Description	Allows a user to modify their organization's current schedule for receiving enrollment status files from NSLDS.
Functional Area	Enrollment Tracking
User Group	ED/FSA, Schools, Lenders, GAs

Reference	NSLDS User Documentation, Chapter 3.5.5.2 Enrollment Reporting Schedule Modify
Comments	There were no requests to modify this screen.

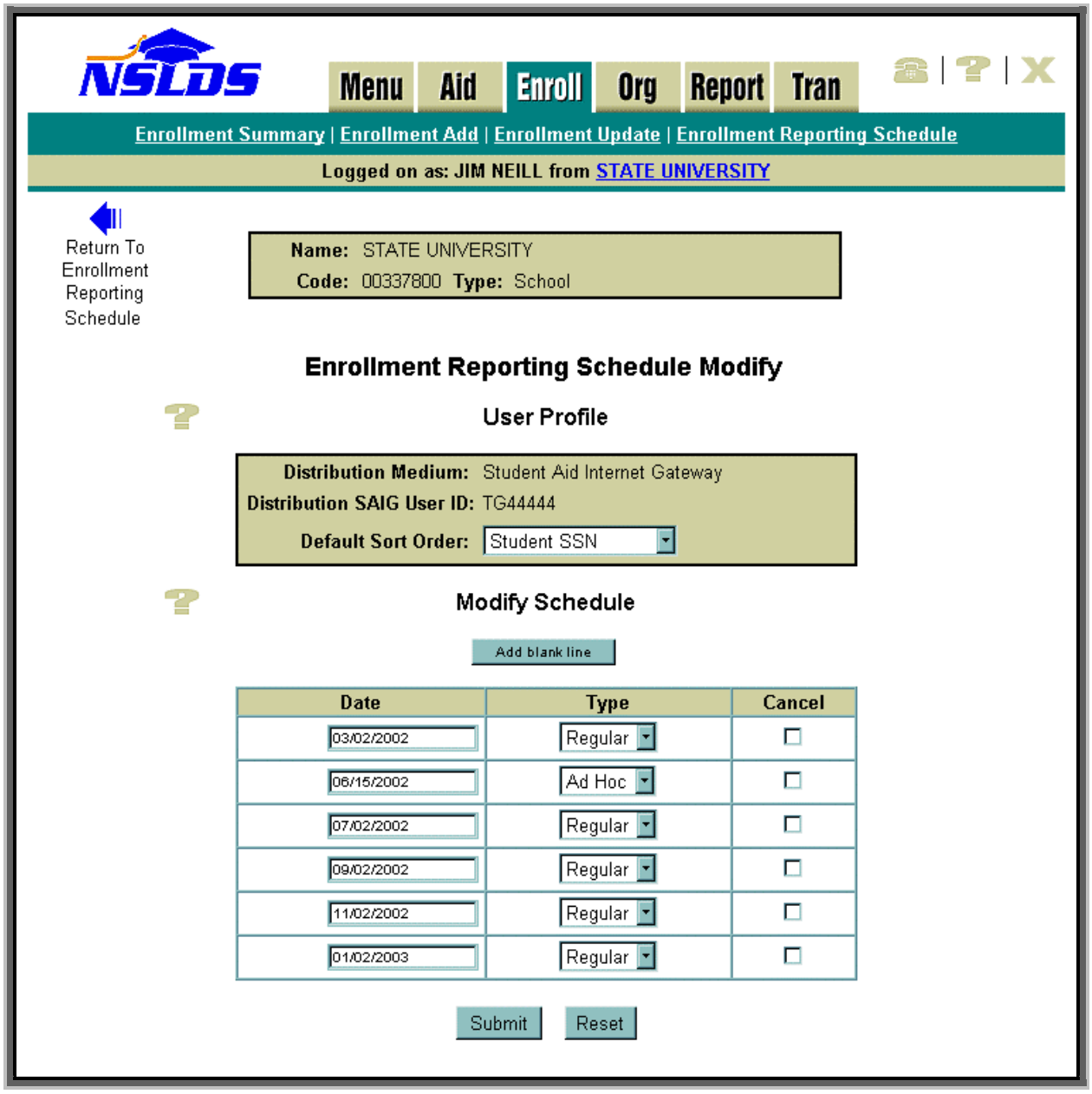


Figure 39, Enrollment Reporting Schedule Modify

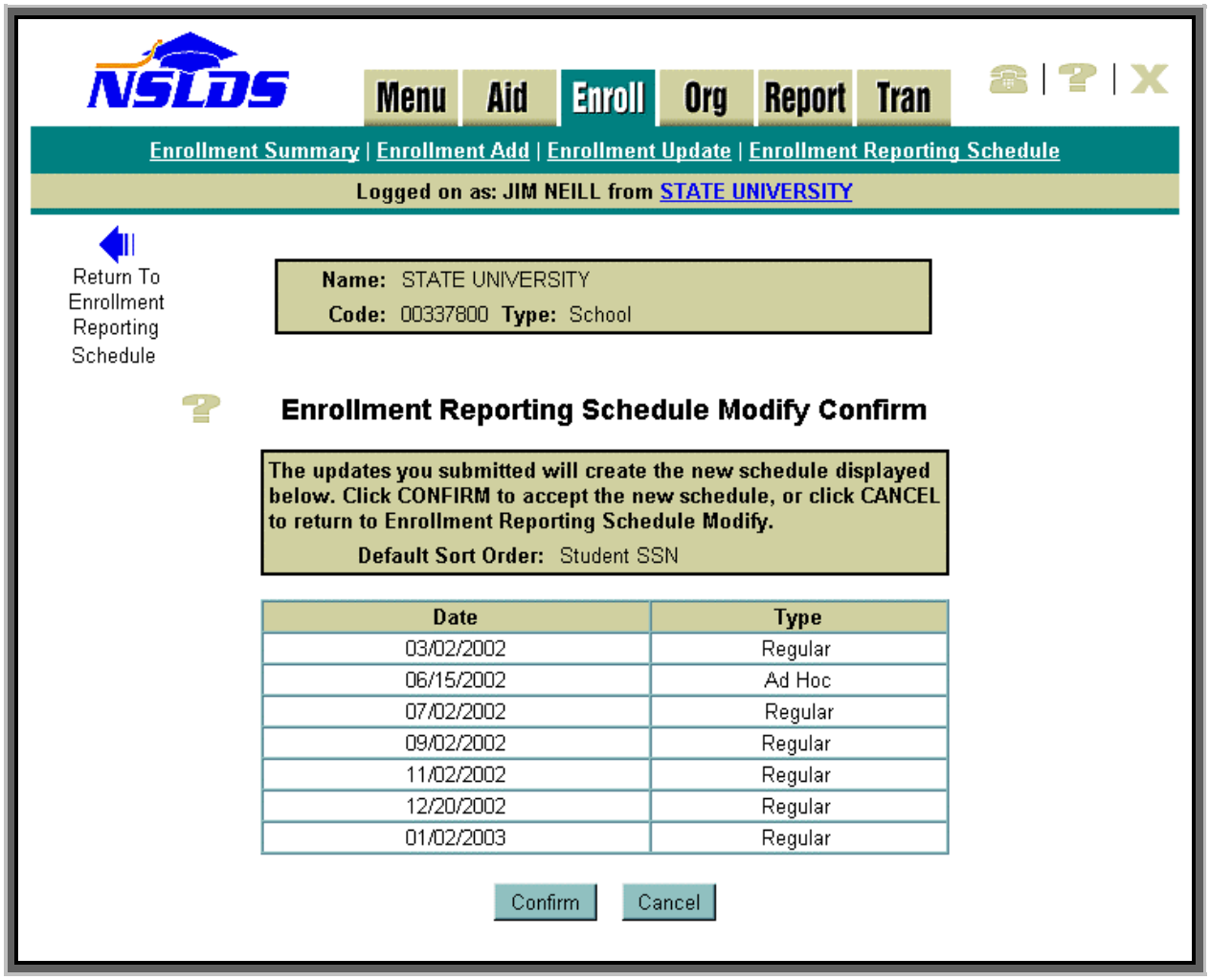


Figure 40, Enrollment Reporting Schedule Modify Confirm

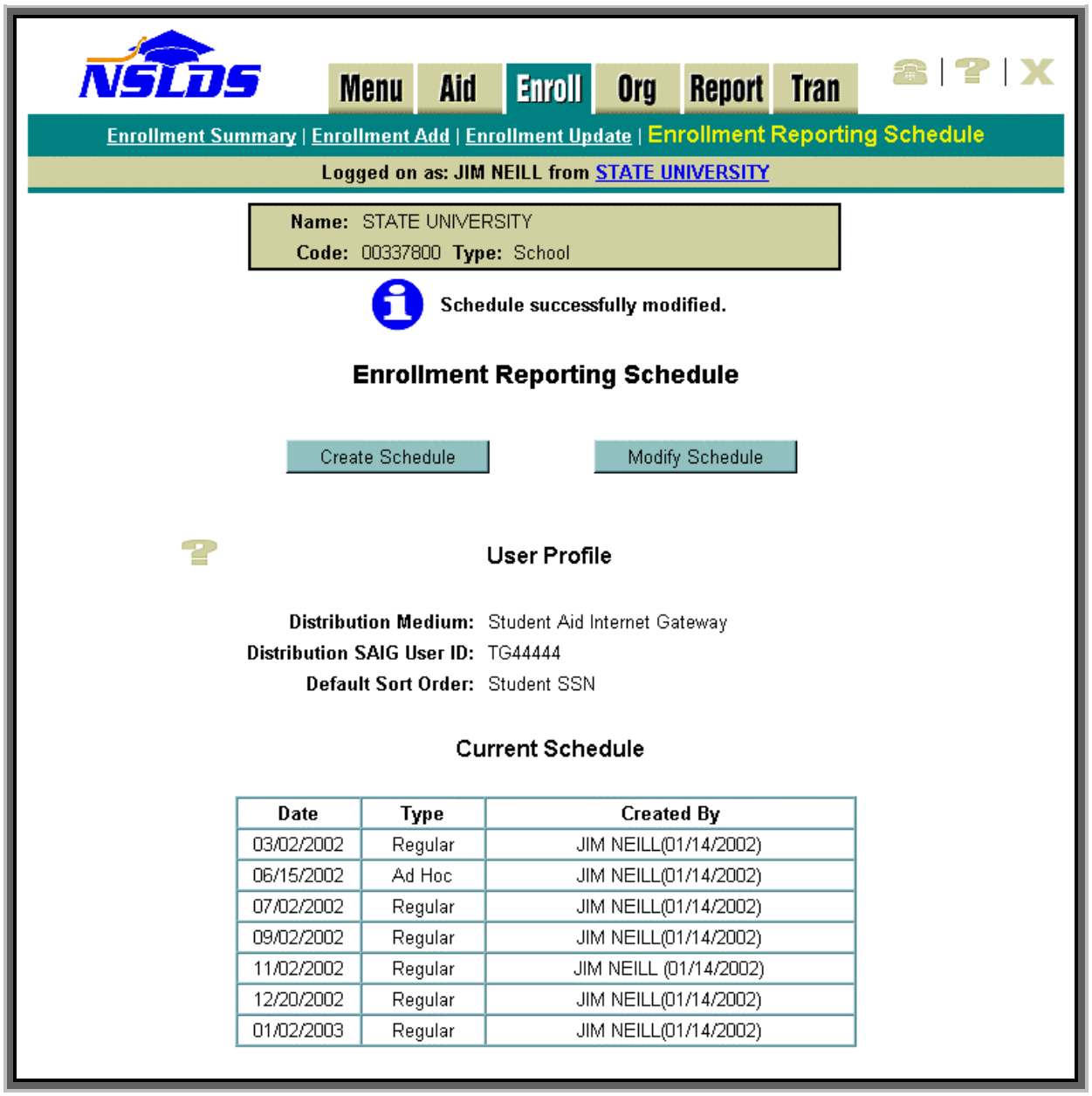


Figure 41, Enrollment Reporting Schedule Create After Confirm

1.3.3.10 Screen Name: Enrollment Waiver

Description	Allows a user to grant waivers to schools for not reporting enrollment information in a timely manner.
Functional Area	Enrollment Tracking
User Group	ED / FSA

Reference	None
Comments	1. A new screen will be developed within the FAP website to support the Enrollment Waiver functionality. It is currently being supported through CICS.

Note: The layout of this screen will be provided during detail design.

1.3.4 Organization

The Organization pages allow users to access information regarding an organization participating in the Title IV program. Users will have the ability to view contact information, cohort default rate information, and school profiles. The following screens can be accessed from the Organization tab.

1.3.4.1 Screen Name: Organization Contact List

Description	Displays the organization and summary contact information for the NSLDS functions.
Functional Area	Loan Transfer Tracking, Audit and Program Review, Research and Policy Development
User Group	ED/FSA, Schools, Lenders, GAs, State Agencies
Reference	NSLDS User Documentation, Chapter 3.6.1 Organization Contact List
Comments	There were no requests to modify this screen.

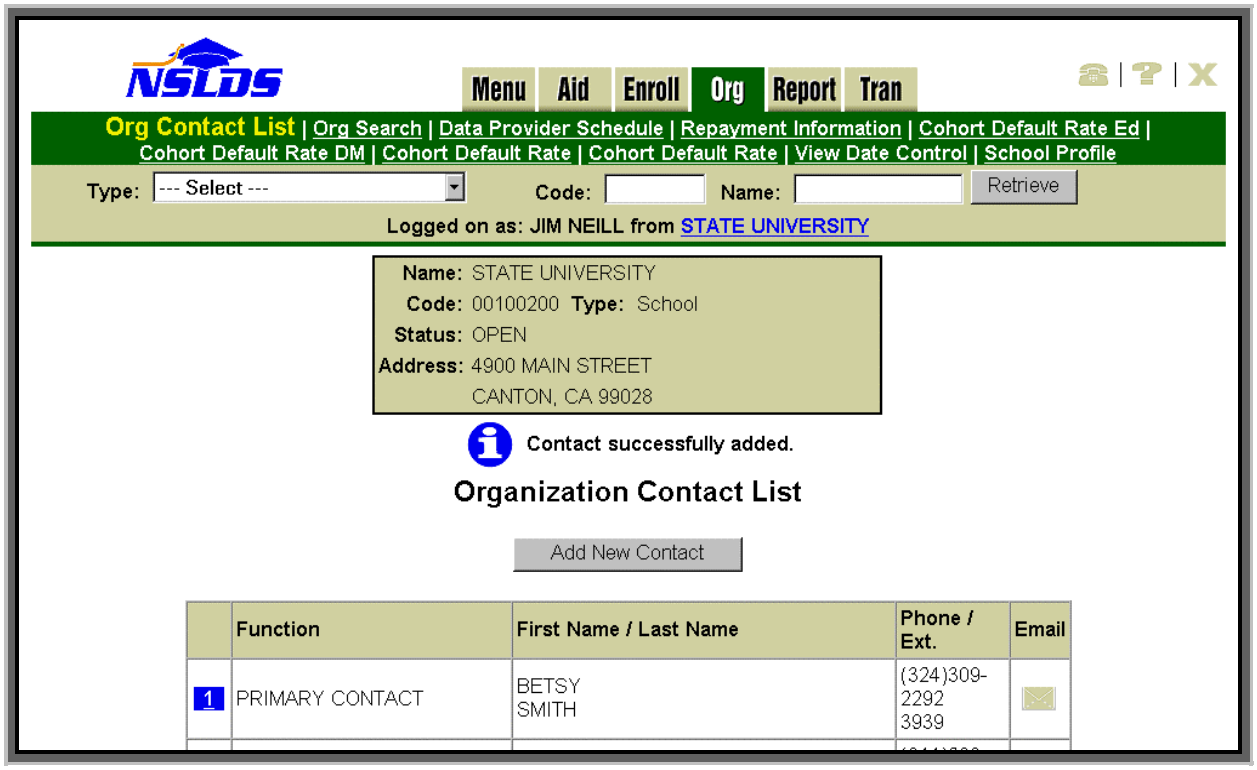


Figure 42, Organization Contact List

1.3.4.2 Screen Name: Organization Contact Detail

Description	Displays contact information for one of the organization's contacts. A user can also update and delete organization contact information from this screen.
Functional Area	Loan Transfer Tracking, Audit and Program Review, Research and Policy Development
User Group	ED/FSA, Schools, Lenders, GAs, State Agencies
Reference	NSLDS User Documentation, Chapter 3.6.1.1 Organization Contact Detail
Comments	There were no requests to modify this screen.

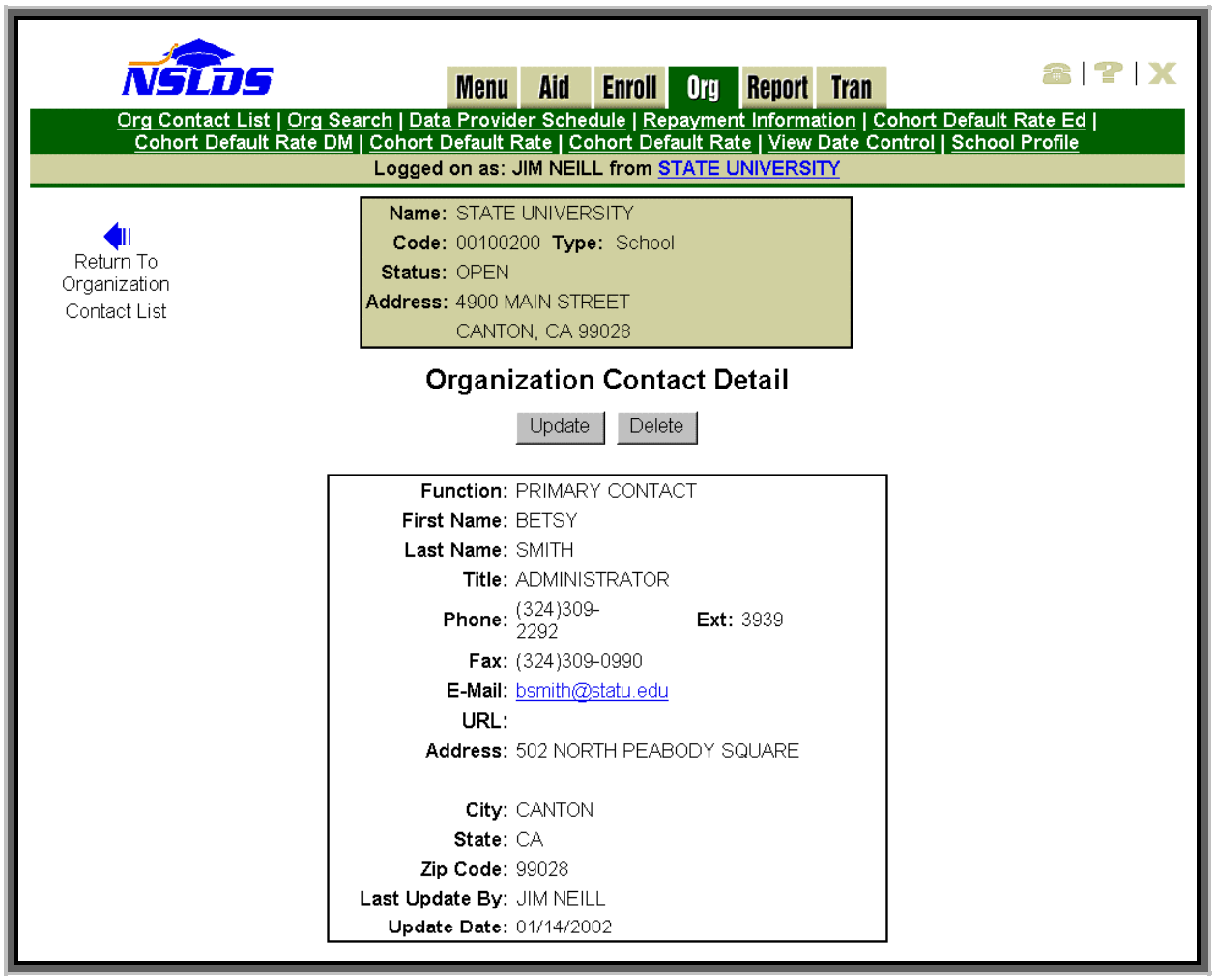


Figure 43, Organization Contact Detail

1.3.4.3 Screen Name: Organization Contact Update

Description	Allows a user to update contact information for their organization.
Functional Area	Loan Transfer Tracking, Audit and Program Review
User Group	ED/FSA, Schools, Lenders, GAs, State Agencies
Reference	NSLDS User Documentation, Chapter 3.6.1.1.1 Organization Contact Update
Comments	There were no requests to modify this screen.

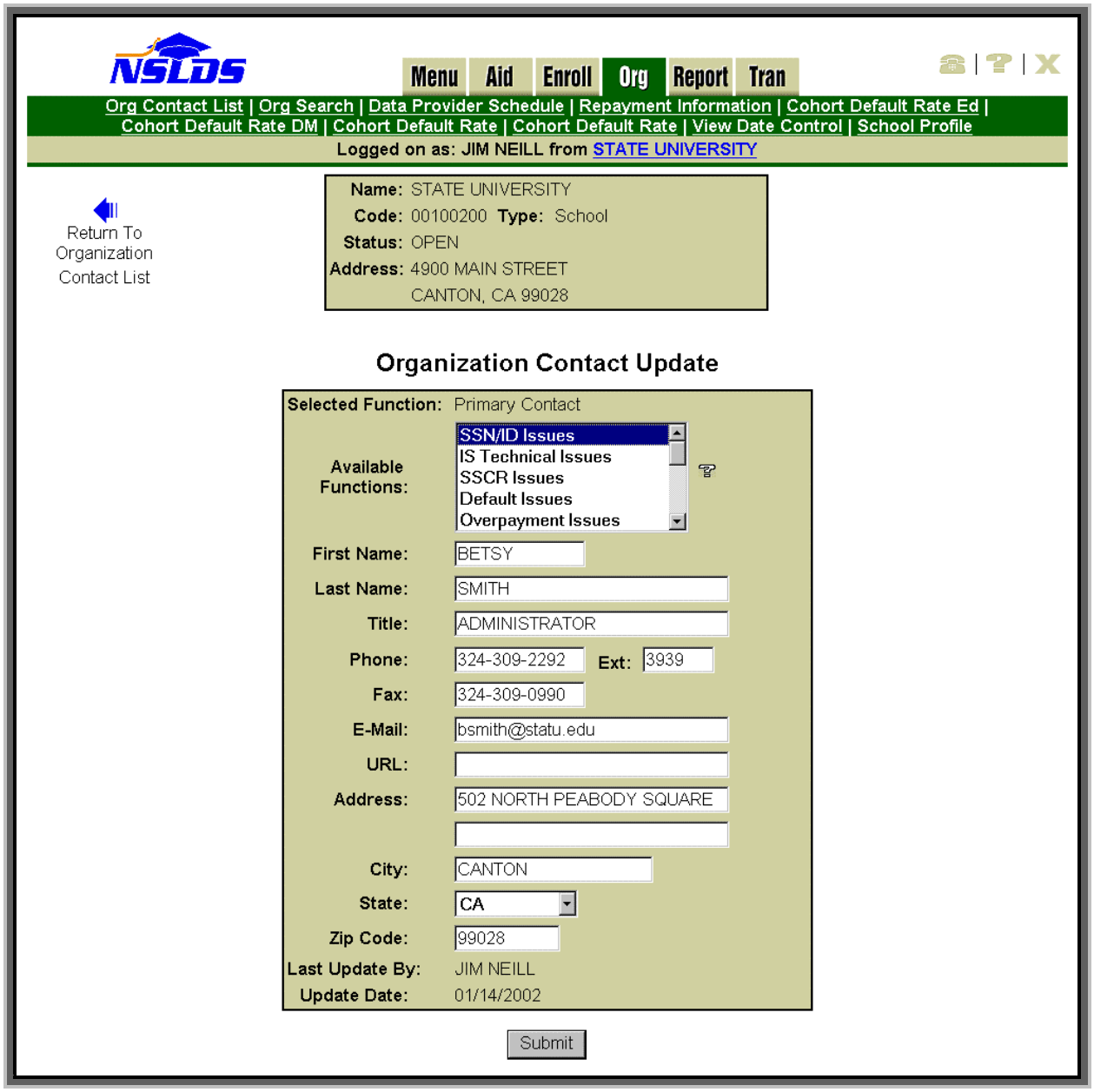


Figure 44, Organization Contact Update

1.3.4.4 Screen Name: Organization Contact Delete

Description	Allows a user to delete a contact on the Organization Contact List.
Functional Area	Loan Transfer Tracking, Audit and Program Review
User Group	ED/FSA, Schools, Lenders, GAs, State Agencies

Reference	NSLDS User Documentation, Chapter 3.6.1.1.2 Organization Contact Delete Confirmation
Comments	There were no requests to modify this screen.

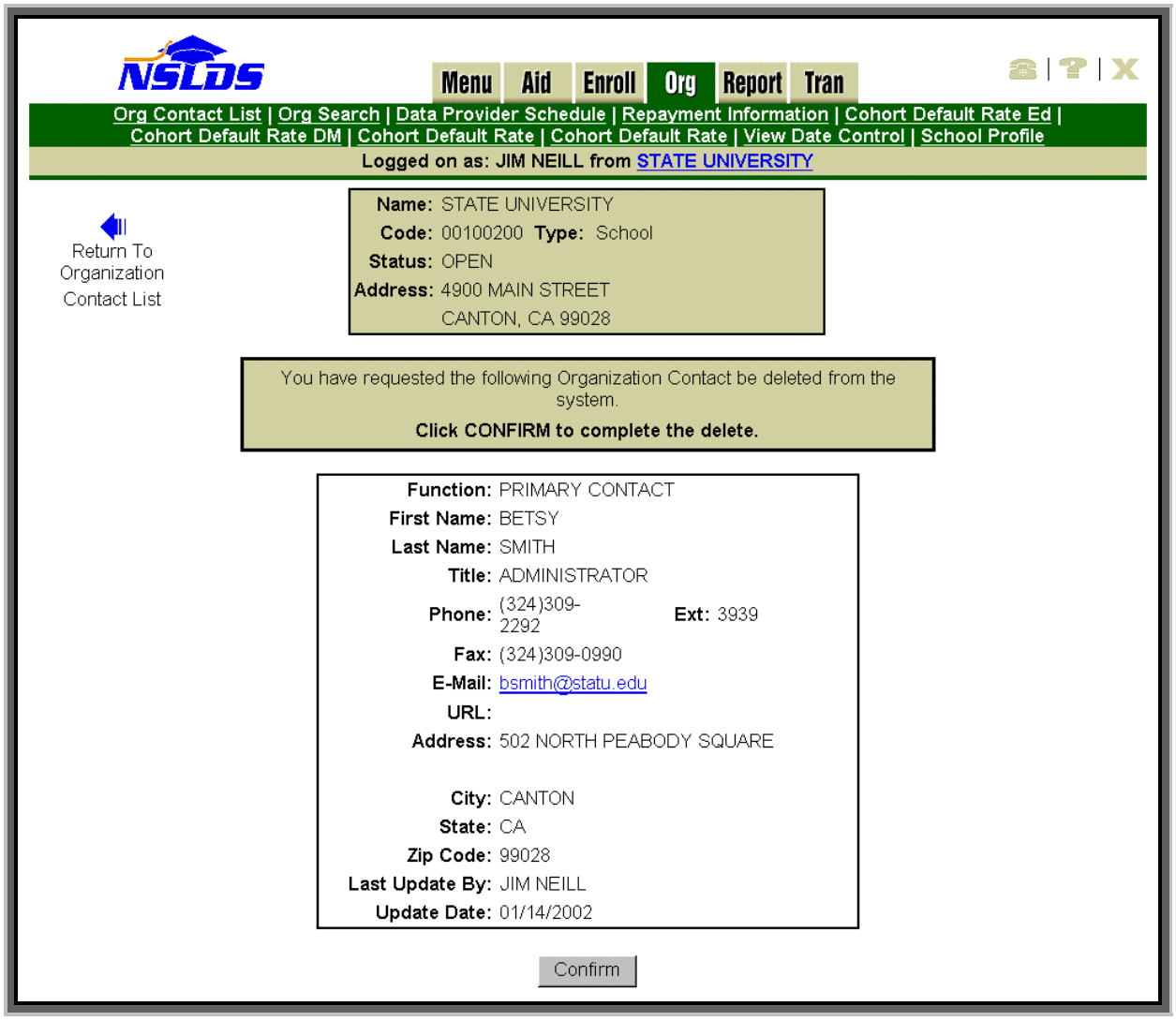


Figure 45, Organization Contact Delete

1.3.4.5 Screen Name: Organization Contact Add

Description	Allows a user to add new contact information for their organization to NSLDS.
Functional Area	Loan Transfer Tracking, Audit and Program Review

User Group	ED/FSA, Schools, Lenders, GAs, State Agencies
Reference	NSLDS User Documentation, Chapter 3.6.1.2 Organization Contact Add
Comments	1. Ability to select "Bankruptcy Issues" from the "Available Functions" drop down list.

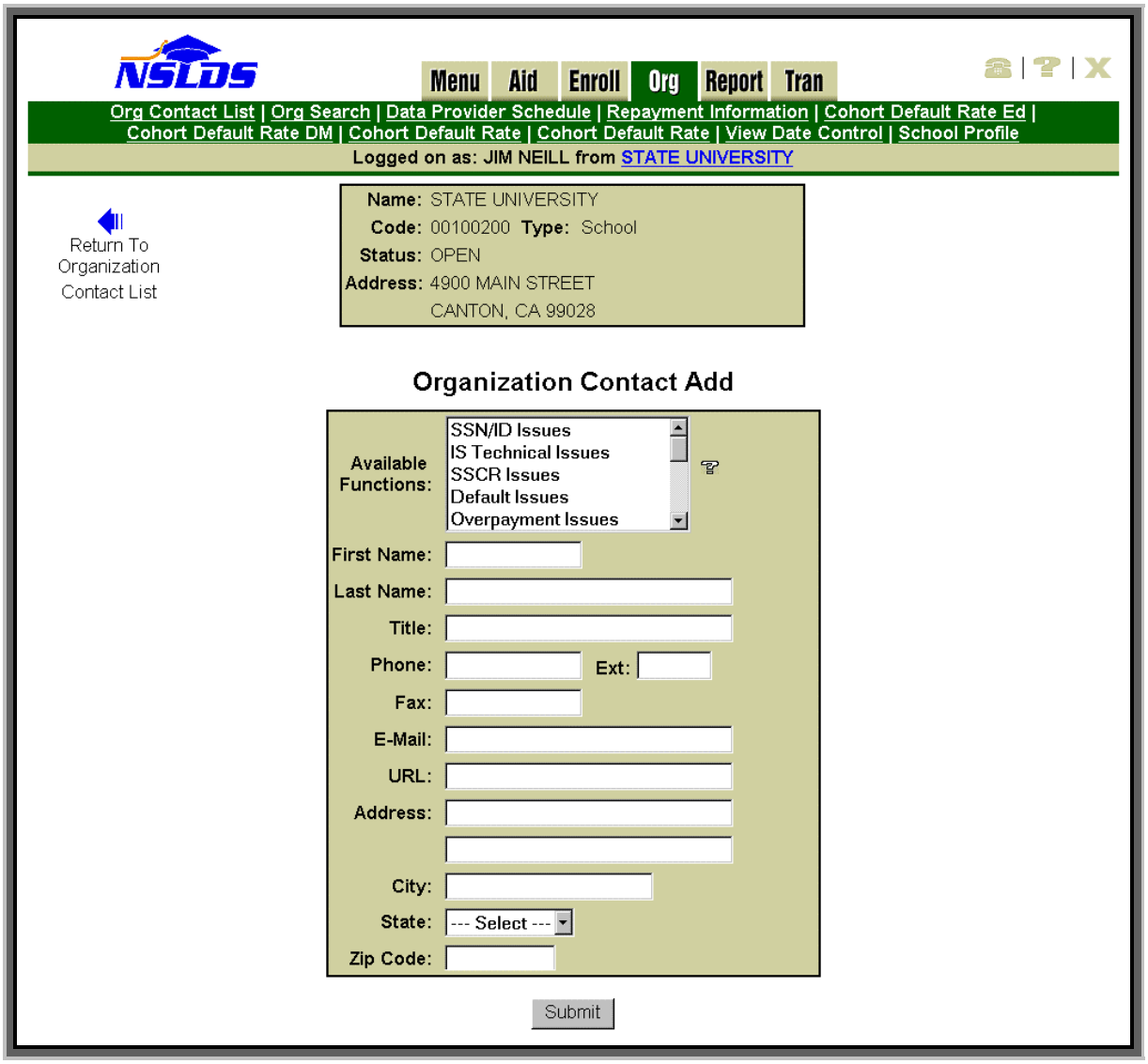


Figure 46, Organization Contact Add

1.3.4.6 Screen Name: Organization Search

Description	Allows a user to find an organization stored in NSLDS.

Functional Area	Loan Transfer Tracking, Audit and Program Review
User Group	ED/FSA, Schools, Lenders, GAs, State Agencies
Reference	NSLDS User Documentation, Chapter 3.6.2 Organization Search
Comments	There were no requests to modify this screen.

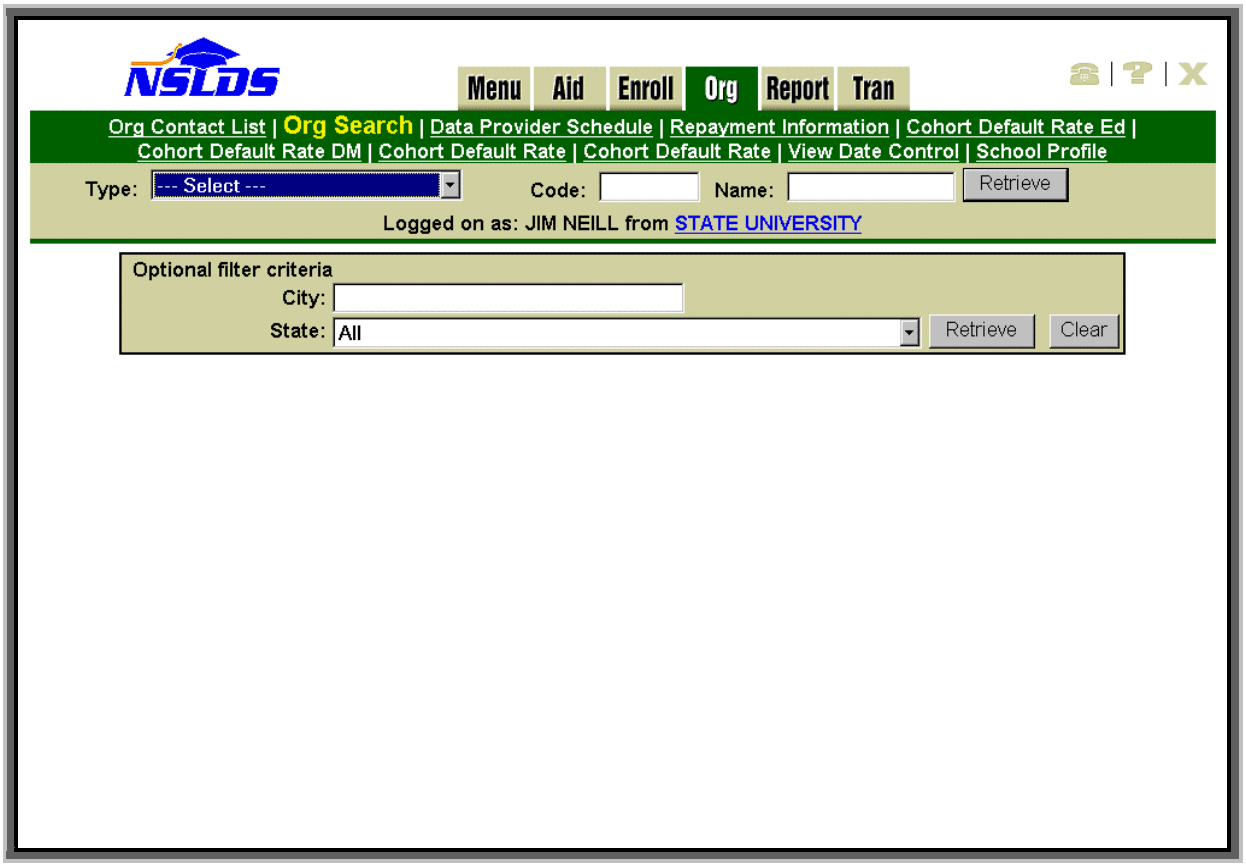


Figure 47, Organization Search

1.3.4.7 Screen Name: Data Provider Schedule

Description	Displays a history of current, past, and future scheduled data provider submittals.
Functional Area	Payment Reasonability
User Group	ED/FSA, Schools, Lenders, GAs
Reference	NSLDS User Documentation, Chapter 3.6.3 Data Provider Schedule
Comments	There were no requests to modify this screen.

NSLDS

Menu | Aid | Enroll | Org | Report | Tran

Org Contact List | Org Search | Data Provider Schedule | Repayment Information | Cohort Default Rate Ed | Cohort Default Rate DM | Cohort Default Rate | Cohort Default Rate | View Date Control | School Profile

Type: -- Select -- Code: Name: Retrieve

Logged on as: JIM NEILL from STATE UNIVERSITY

Name: STATE UNIVERSITY
Code: 00100200 **Type:** School
Status: OPEN
Address: 4900 MAIN STREET
CANTON, CA 99028

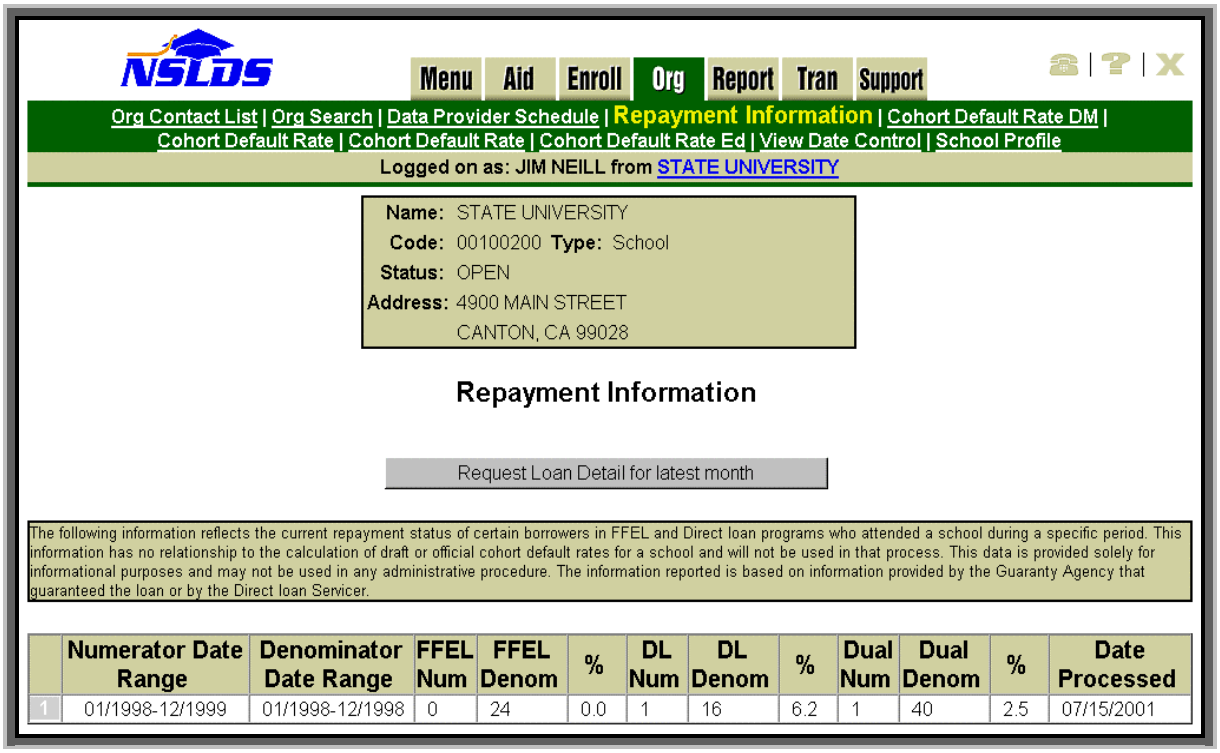
Data Provider Schedule

Scheduled Submittal Date	Received Date	Processed Date	Loan Records Extracted	Loans with Errors	Submittal Pass Rate(%)
12/11/2002	N/A	N/A	N/A	N/A	N/A
11/13/2002	N/A	N/A	N/A	N/A	N/A
10/16/2002	N/A	N/A	N/A	N/A	N/A
09/11/2002	N/A	N/A	N/A	N/A	N/A
08/14/2002	N/A	N/A	N/A	N/A	N/A
07/17/2002	N/A	N/A	N/A	N/A	N/A
06/12/2002	N/A	N/A	N/A	N/A	N/A
05/15/2002	N/A	N/A	N/A	N/A	N/A
04/17/2002	N/A	N/A	N/A	N/A	N/A
03/13/2002	N/A	N/A	N/A	N/A	N/A
02/13/2002	N/A	N/A	N/A	N/A	N/A
01/16/2002	N/A	N/A	N/A	N/A	N/A
12/12/2001	N/A	N/A	N/A	N/A	N/A
11/14/2001	N/A	N/A	N/A	N/A	N/A
10/17/2001	N/A	N/A	N/A	N/A	N/A
08/15/2001	N/A	N/A	N/A	N/A	N/A
07/18/2001	N/A	N/A	N/A	N/A	N/A
06/13/2001	N/A	N/A	N/A	N/A	N/A
05/16/2001	N/A	N/A	N/A	N/A	N/A
04/18/2001	N/A	N/A	N/A	N/A	N/A
03/14/2001	N/A	N/A	N/A	N/A	N/A
02/14/2001	N/A	N/A	N/A	N/A	N/A
01/17/2001	N/A	N/A	N/A	N/A	N/A
12/13/2000	N/A	N/A	N/A	N/A	N/A
11/15/2000	N/A	N/A	N/A	N/A	N/A

Figure 48, Data Provider Schedule

1.3.4.8 Screen Name: Repayment Information

Description	Displays the current repayment status of certain borrowers in Federal Family Education Loan (FFEL) and Direct Loan (DL) programs who attended a school during a specific period.
Functional Area	Payment Reasonability
User Group	ED / FSA
Reference	NSLDS User Documentation, Chapter 3.6.4 Repayment Information
Comments	There were no requests to modify this screen.



	Numerator Date Range	Denominator Date Range	FFEL Num	FFEL Denom	%	DL Num	DL Denom	%	Dual Num	Dual Denom	%	Date Processed
1	01/1998-12/1999	01/1998-12/1998	0	24	0.0	1	16	6.2	1	40	2.5	07/15/2001

Figure 49, Repayment Information

1.3.4.9 Screen Name: Cohort Default Rate History List

Description	Allows a user to view a history of the default rates for the selected organization and request Loan Details.
Functional Area	Cohort Default Rate, Research and Policy Development
User Group	ED / FSA, Schools
Reference	NSLDS User Documentation, Chapter 3.6.5 Cohort Default Rate History List
Comments	1. Ability for a user to view the "School Num", "School Denom" and

	"Rate".

NSLDS

Menu | Aid | Enroll | Org | Report | Tran

Org Contact List | Org Search | Data Provider Schedule | Repayment Information | Cohort Default Rate Ed | Cohort Default Rate DM | Cohort Default Rate | Cohort Default Rate | View Date Control | School Profile

Type: --- Select --- Code: Name: Retrieve

Logged on as: JIM NEILL from STATE UNIVERSITY

Name: STATE UNIVERSITY
Code: 00100200 **Type:** School
Status: OPEN
Address: 4900 MAIN STREET
CANTON, CA 99028

Cohort Default Rate History List

Request Loan Details

Fiscal Year	Rate Type	Rate Sub Type	FFEL Num	FFEL Denom	Rate	DL Num	DL Denom	Rate	Dual Num	Dual Denom	Rate	Process Date
1999	OFFICIAL	TR COMBO	0	1203	0	0	1203	0	0	1203	0	07/12/2001
		ACTUAL	0	23	0	0	1180	0	0	1203	0	07/12/2001
1998	OFFICIAL	ACTUAL	8	1382	0.5	1	16	6.2	9	1395	0.6	07/12/2001
1997	OFFICIAL	ACTUAL	1	35	2.8	0	33	0	1	54	1.8	07/12/2001
1996	DRAFT	TR COMBO	26	162	16	26	162	16	26	162	16	07/12/2001
		ACTUAL	10	43	23.2	0	10	0	10	53	18.8	07/12/2001
	OFFICIAL	TR COMBO	26	162	16	26	162	16	26	162	16	07/12/2001
		ACTUAL	10	43	23.2	0	10	0	10	53	18.8	07/12/2001
1995	OFFICIAL	TR COMBO	17	141	12	17	141	12	17	141	12	07/11/2001
		ACTUAL	10	50	20	0	17	0	10	64	15.6	07/11/2001
1994	OFFICIAL	TR COMBO	1	30	3.3	0	0	0	0	0	0	07/11/2001
		ACTUAL	1	30	3.3	0	0	0	0	0	0	07/11/2001
1993	OFFICIAL	TR COMBO	1	32	3.1	0	0	0	0	0	0	07/11/2001
		ACTUAL	1	32	3.1	0	0	0	0	0	0	07/11/2001
1992	OFFICIAL	ACTUAL	96	601	15.9	0	0	0	0	0	0	08/11/1994
1991	RECALC	ACTUAL	109	665	16.3	0	0	0	0	0	0	05/04/1994
1990	OFFICIAL	ACTUAL	121	614	19.7	0	0	0	0	0	0	07/29/1992

The Cohort Default rates listed above may not reflect changes that have resulted from the Cohort Default rate challenge/adjustment/appeal processes.

Figure 50, Cohort Default Rate History List

1.3.4.10 Screen Name: Rate Substitution

Description	Allows Default Management to record that one school's rate should be substituted for another school's rate.
Functional Area	Cohort Default Rate
User Group	ED/FSA
Reference	None
Comments	1. A new screen will be developed within the FAP website to support the Rate Substitution functionality. It is currently being supported through CICS.

Note: The layout of this screen will be provided during detail design.

1.3.4.11 Screen Name: Rate Combination

Description	Allows Default Management to record that the rates for two or more schools should be aggregated and assigned to one school (Lead School Combo) or to all schools (True Combo).
Functional Area	Cohort Default Rate
User Group	ED/FSA
Reference	None
Comments	1. A new screen will be developed within the FAP website to support the Rate Combination functionality. It is currently being supported through CICS.

Note: The layout of this screen will be provided during detail design.

1.3.4.12 Screen Name: Suspend Default Rates

Description	Allows Default Management to prevent a rate for a school from displaying in any online or paper report by court order. Only displayable to Default Management users.
Functional Area	Cohort Default Rate
User Group	ED/FSA
Reference	None
Comments	1. A new screen will be developed within the FAP website to support the Suspend Default Rates functionality. It is currently being supported through CICS.

Note: The layout of this screen will be provided during detail design.

1.3.4.13 Screen Name: School Profile

Description	Allows a user to view Title IV grant and loan programs, as well as the school's academic and program schedule information.
Functional Area	Audit and Program Review
User Group	ED/FSA
Reference	NSLDS User Documentation, Chapter 3.6.6 School Profile
Comments	There were no requests to modify this screen.

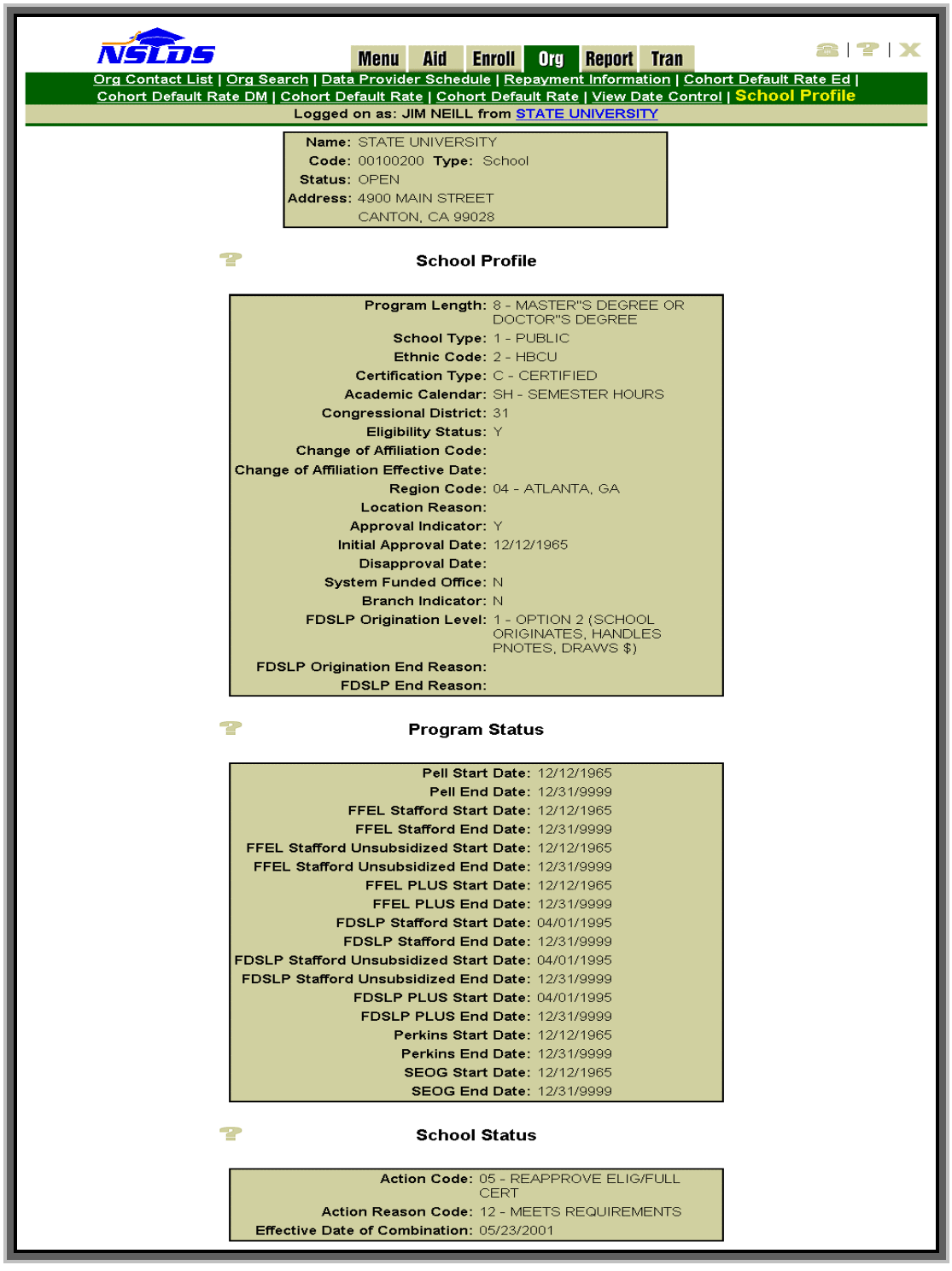


Figure 51, School Profile

1.3.5 Reporting

The existing reporting functionality for NSLDS will be completely overhauled and replaced by MicroStrategy's reporting tool. This will result in new report screens and functionality for the user. The following section provides a high level overview of some basic report screens and features that are provided by the MicroStrategy reporting tool and will be incorporated into NSLDS II.

Note:

- The Report Content Descriptions & System Procedures document contains detailed information regarding new and existing reports that will be delivered during NSLDS II.
- The screenshots within this section were referenced from the Credit Management Data Mart (CMDM) user guide. The content within the screenshots is not relevant to NSLDS II but serves as a guide for illustrative purposes.
- The following screenshots for CMDM used version 7.1 of the MicroStrategy reporting tool. NSLDS II will use a later Version, 7.i.

1.3.5.1 Reporting Menu

In order to navigate to the new report screens, a user will have the ability to select the Reporting link from the Main Menu of the FAP website (this is the same process that is performed today). The Reporting Menu serves as the default screen for accessing and executing reports. A user will have the ability to view or create reports based on their specific permission level. Each user will be categorized into one or multiple functional groups. Based on the permission levels for each functional group, a user will have the ability to view certain data. The Reporting Menu screen will provide each user the following options:

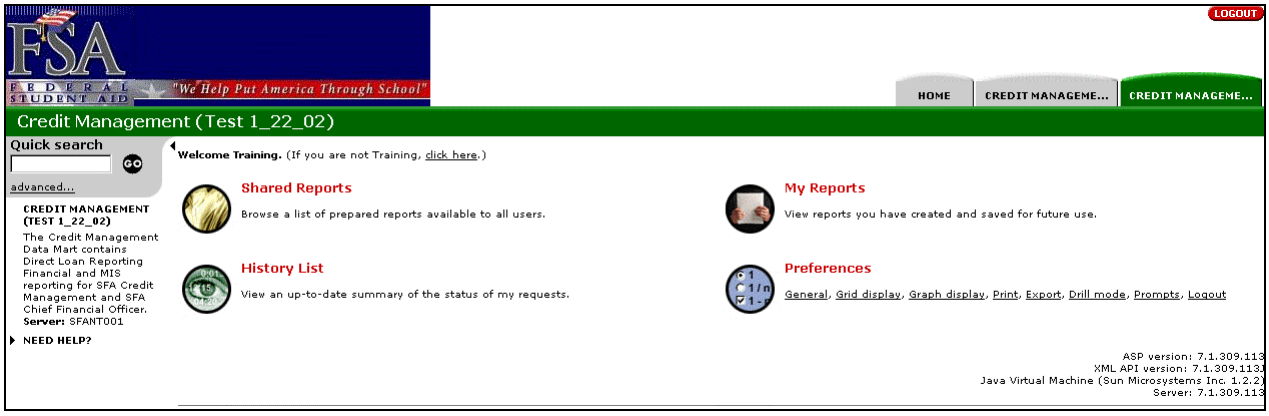


Figure 52, Reporting Menu

Shared Reports

Browse a list of prepared reports available to all users.

- **Shared Reports:** Location for NSLDS II reports that have been created for all users. The shared reports that a user can view are based on the user's access permissions as defined by the NSLDS II administrator. This is also the location for the NSLDS II administrator to save reports that a user wants to share with other users.

My Reports

View reports you have created and saved for future use.

- **My Reports:** Default location for a user to save his or her customized reports. Users will have the ability (based on permission level) to develop reports on an ad hoc basis. These reports can be shared with other users, if moved to the Shared Reports folder, or stored for future use.

History List

View an up-to-date summary of the status of my requests.

- **History List:** Stores a copy of executed reports for a user. This allows the user to access the results from a previous execution resulting in decreased processing time.

Preferences

General, Grid display, Graph display, Print, Export, Drill mode, Prompts, Logout

- **Preferences:** Enables a user to set up preferences for specific reporting functionality (e.g., grid and graph display modes, reports, printing, exporting, drilling, viewing filter details).

1.3.5.2 Shared Reports

Within the Shared Reports folder, reports with similar topics will be grouped together and stored within a common folder. Each folder will contain the following information:

- Folder Name
- Folder Description
- Folder Owner
- Modified Date

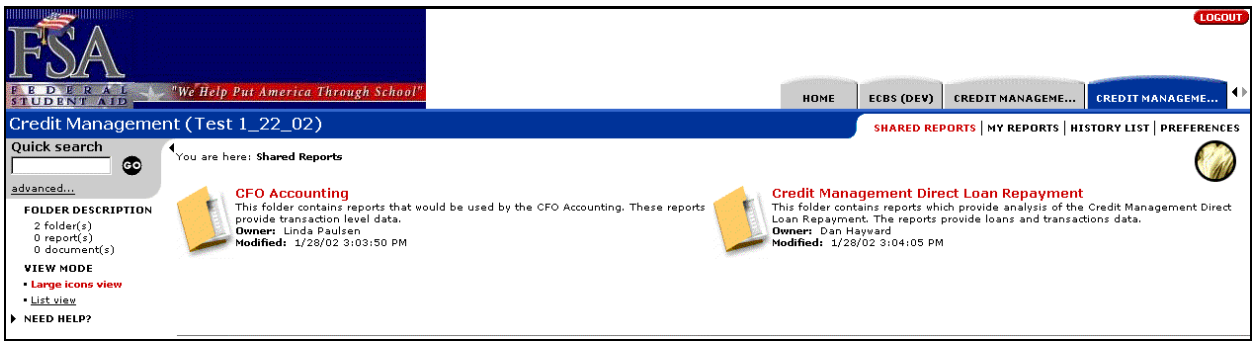


Figure 53, Shared Reports Folder

A user may access an individual report by selecting the appropriate folder. Each report icon will contain the following information:

- Report Name
- Report ID
- Report Description
- Report Owner
- Modified Date

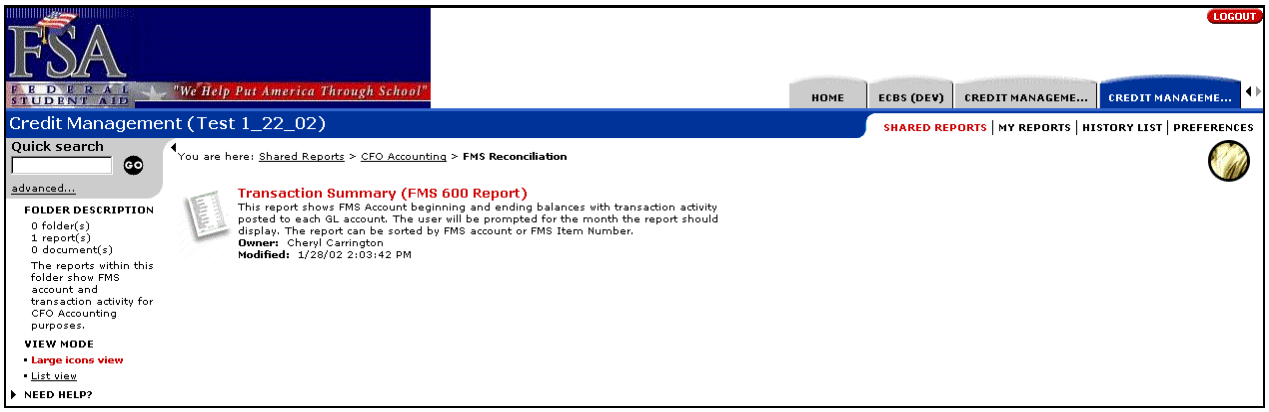


Figure 54, Shared Reports

A user will have the option to select one or more parameters for filtering the data based on their needs. MicroStrategy will automatically generate the SQL and provide the results to the user. Results will be filtered by MicroStrategy based on the user access level.

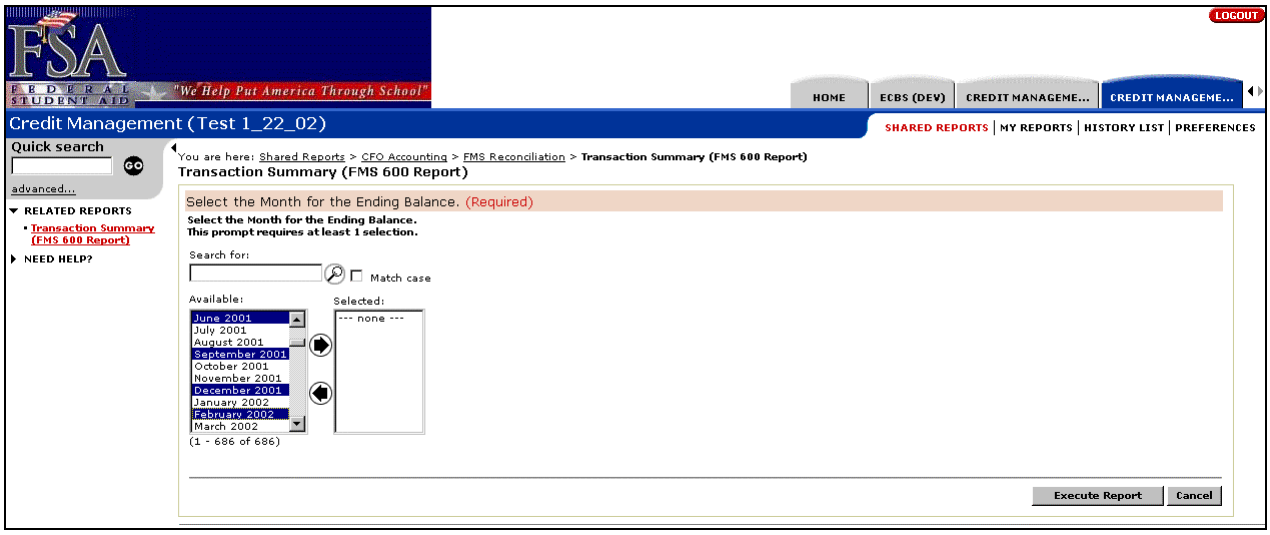


Figure 55, Parameter Selection

The report is automatically generated after the user executes the report (i.e., selects the Execute Report pushbutton). By default, each report will allow the user to perform the following functions:

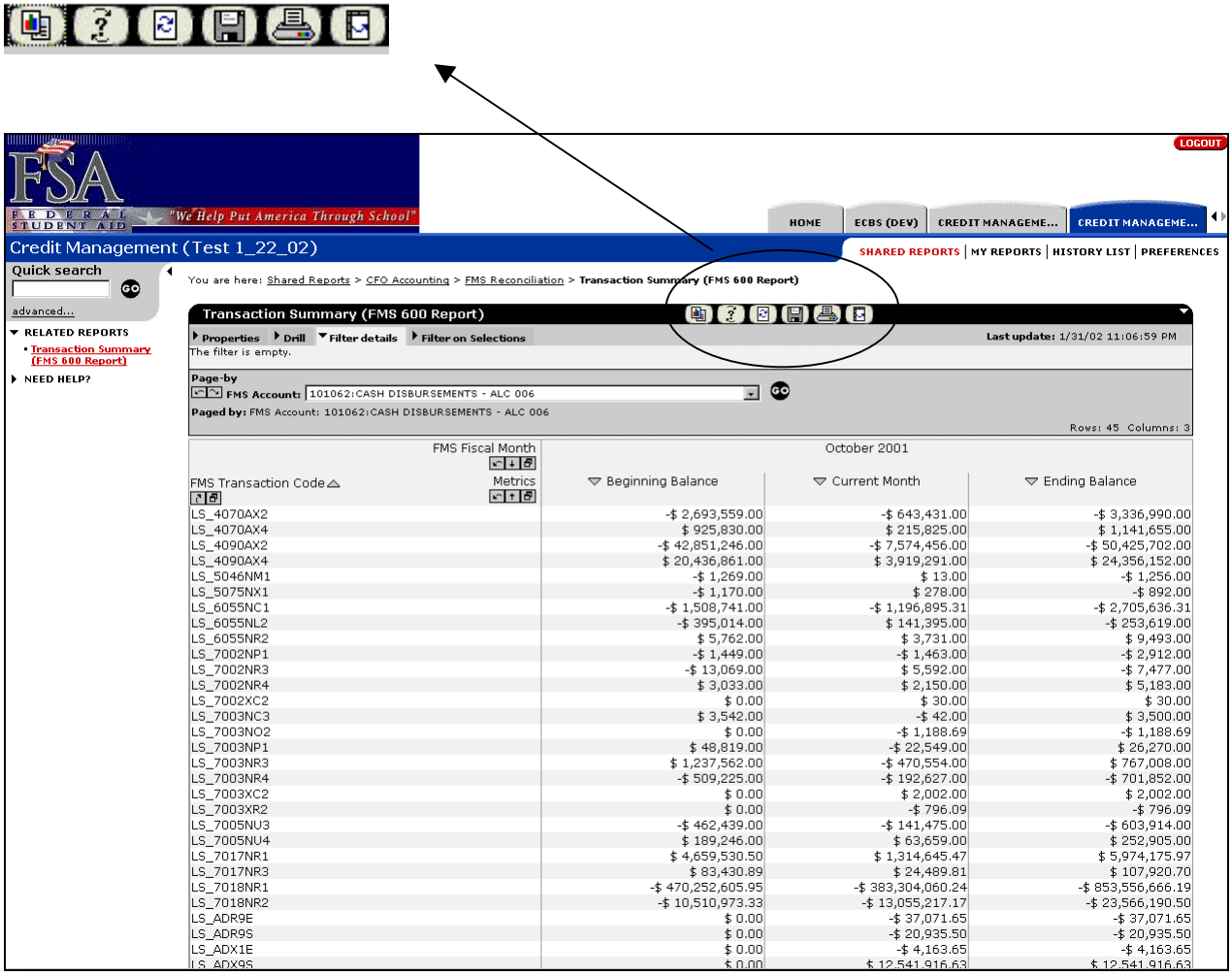


Figure 56, Report Functionality

- **Graphs** - Displays data in the form of the selected graph
- **Re-prompt** - Returns the user back to the selection criteria window where they would select the metrics and attributes on which to qualify
- **Refresh Report** - Re-executes the report against the database and refreshes all data
- **Save** - Saves reports to My Reports.

- **Print** - Enables the User to print a report, including setting up the print options. Print options include setting up a header and footer, changing paper size and orientation, setting the page numbering style, determining how many rows and columns print on a page, and choosing whether to print filter details. After the User has set the print options, the report is displayed as it appears when printed.

- **Export Data** - Enables the User to export a report, including setting up export options. Export options include selecting the desired application (Excel, Lotus, HTML, or plain text), determining how much of the report to export, and choosing whether to export filter details. After the User has set the export options, the report is exported to the appropriate format

A user may also have the ability to see the report details (e.g., SQL, object identification numbers). This feature is useful for troubleshooting error messages.

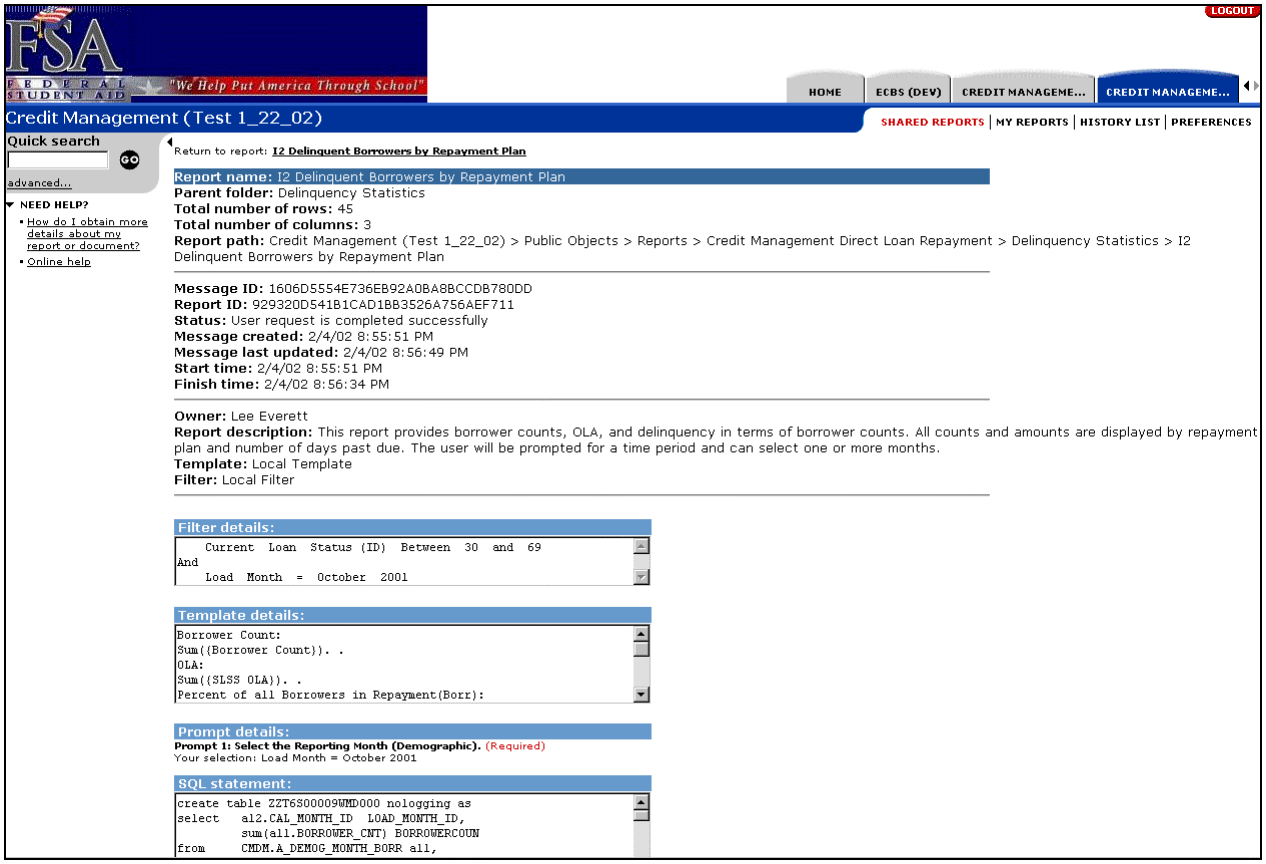


Figure 57, Report Details

1.3.6 Transfer Monitoring

The Transfer Monitoring pages allow a user to view and modify transfer student information. The following screens can be accessed from the Transfer Monitoring tab.

1.3.6.1 Screen Name: Transfer Monitoring List

Description	Lists all transfer students submitted by the school to be monitored by NSLDS for reported changes.
Functional Area	Student Transfer Monitoring
User Group	Schools
Reference	NSLDS User Documentation, Chapter 3.8.1 Transfer Monitoring List
Comments	There were no requests to modify this screen.

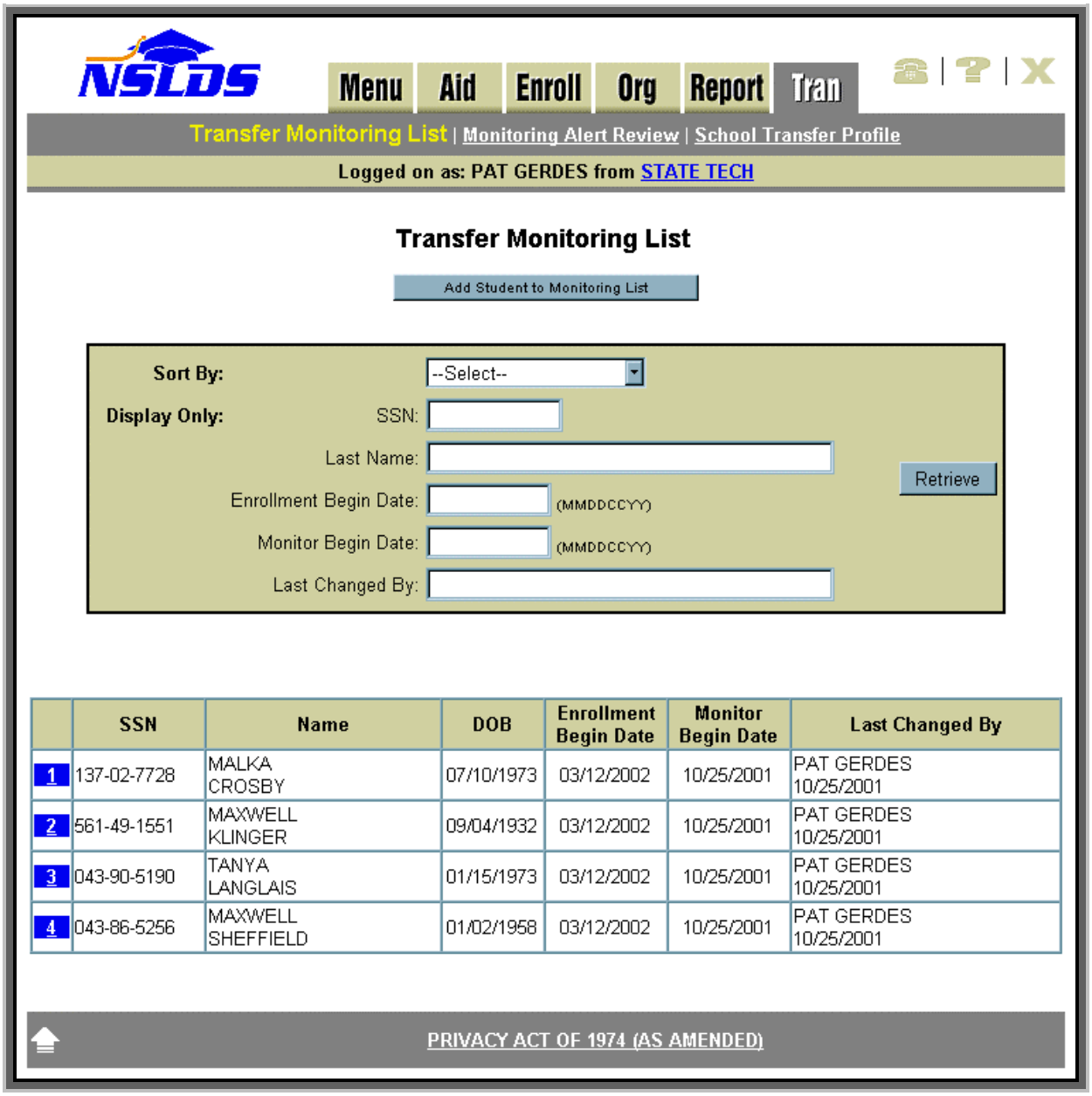


Figure 58, Transfer Monitoring List

1.3.6.2 Screen Name: Student Monitoring Add

Description	Allows a user to add a student to the Transfer Monitoring List.
Functional Area	Student Transfer Monitoring
User Group	Schools
Reference	NSLDS User Documentation, Chapter 3.8.1.1 Student Monitoring Add

Comments	There were no requests to modify this screen.

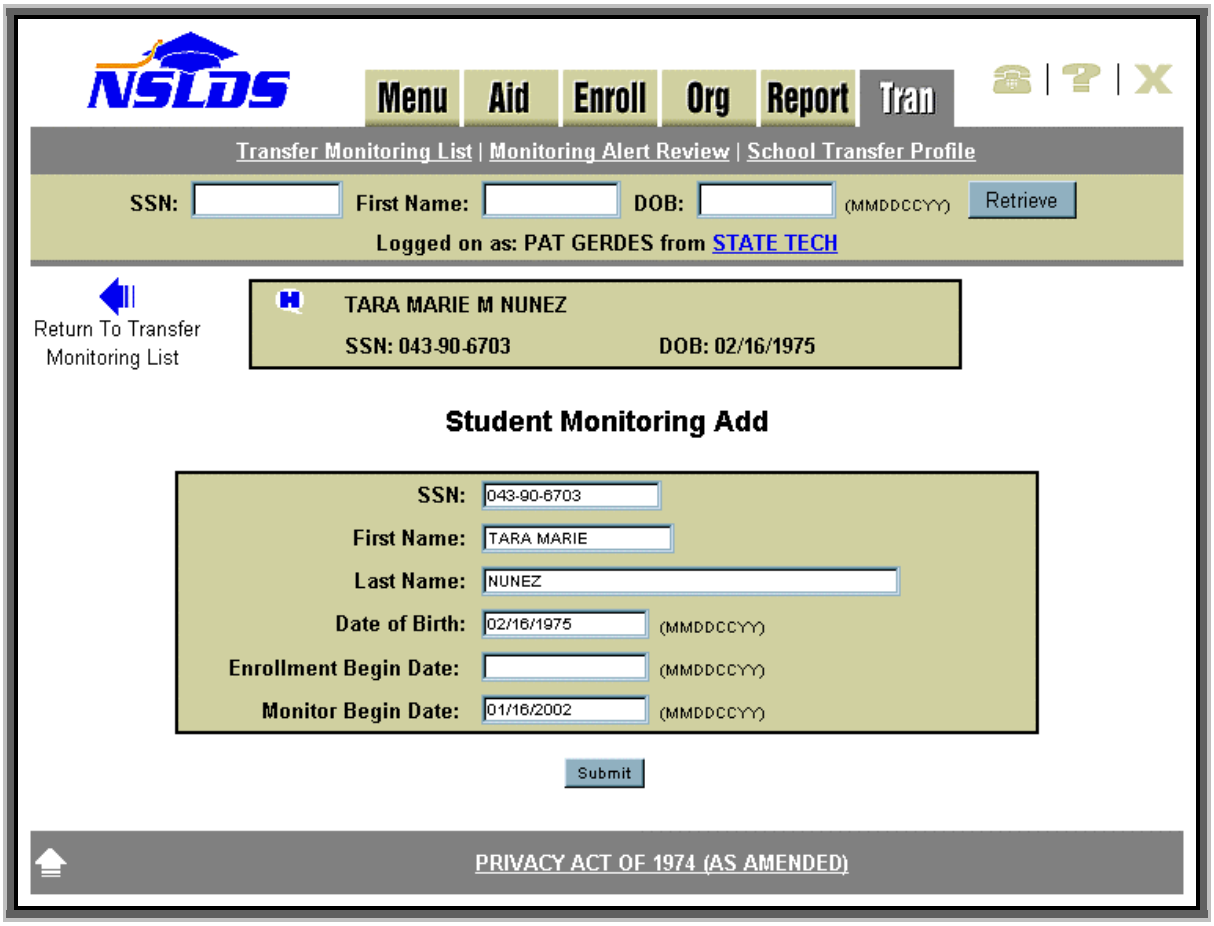


Figure 59, Student Monitoring Add

1.3.6.3 Screen Name: Student Monitoring Detail

Description	Displays detailed transfer monitoring student information that can be updated or deleted.
Functional Area	Student Transfer Monitoring
User Group	Schools
Reference	NSLDS User Documentation, Chapter 3.8.1.2 Student Monitoring Detail
Comments	There were no requests to modify this screen.

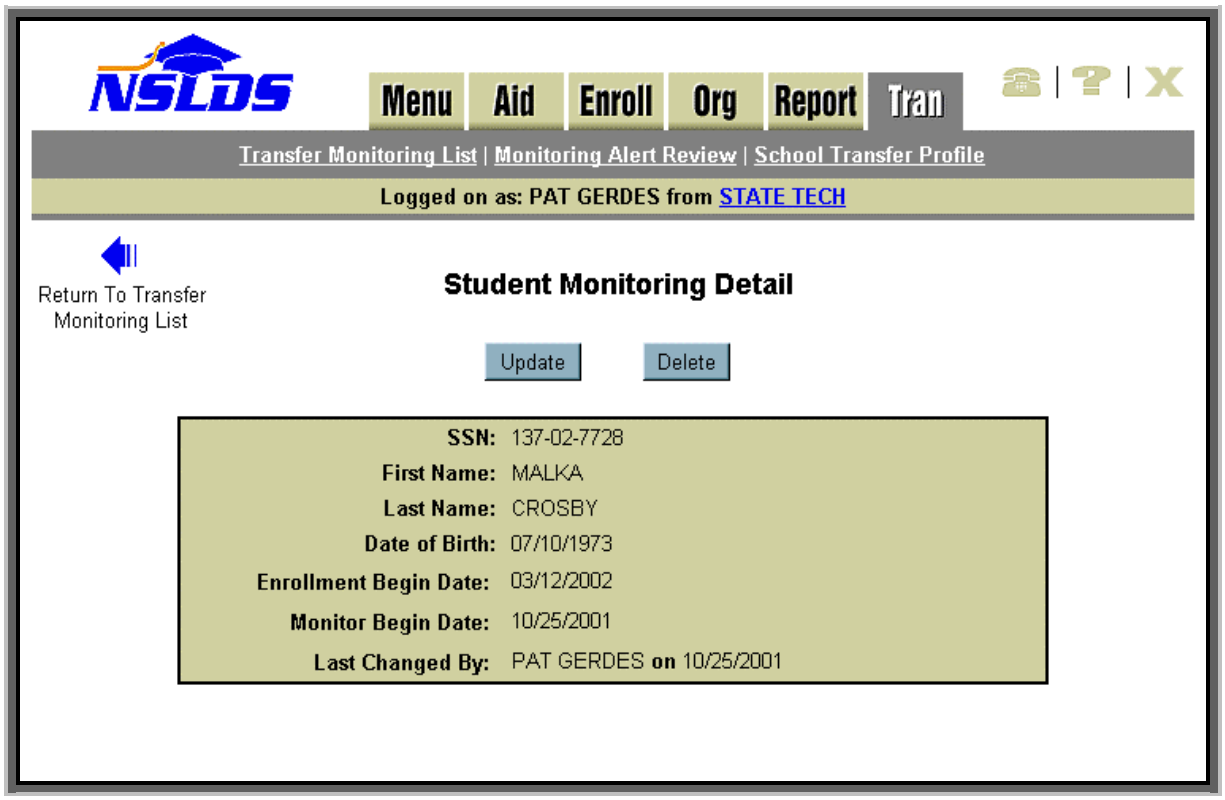


Figure 60, Student Monitoring Detail

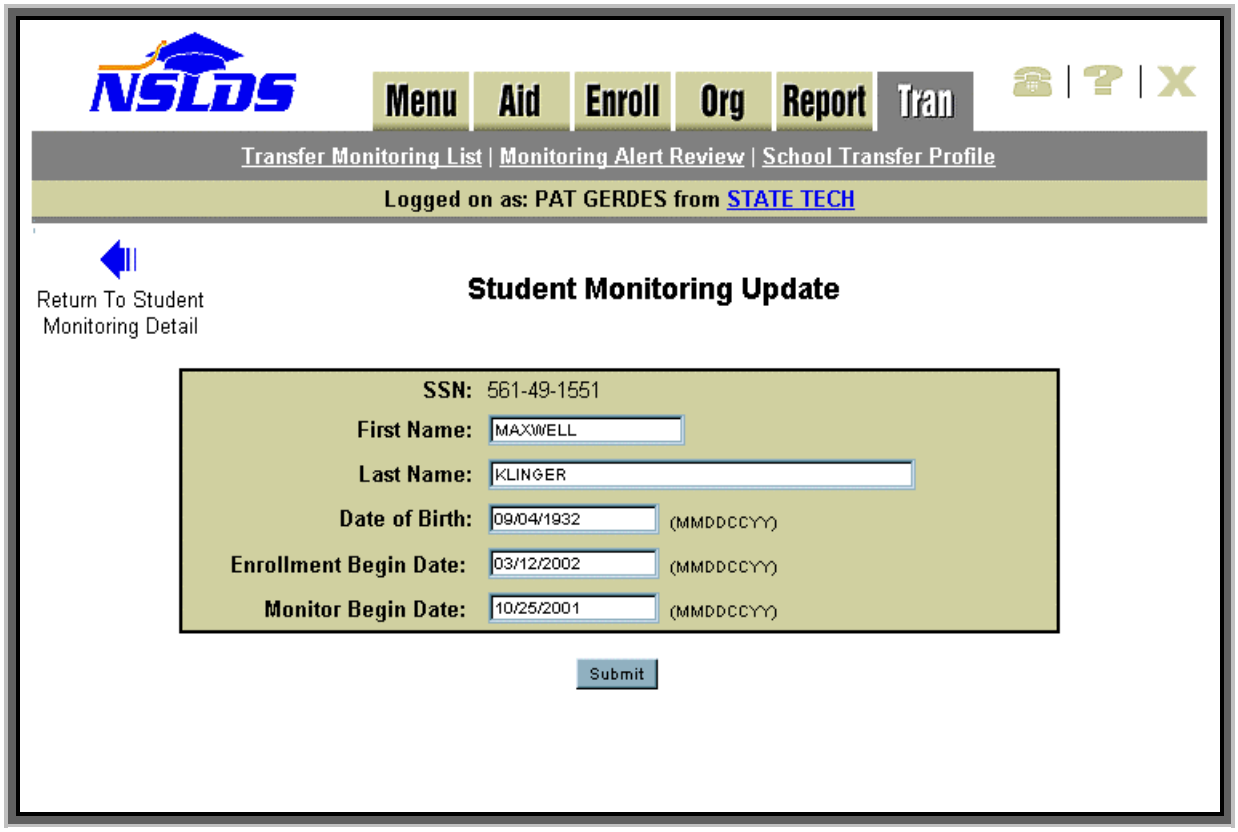


Figure 61, Student Monitoring Update

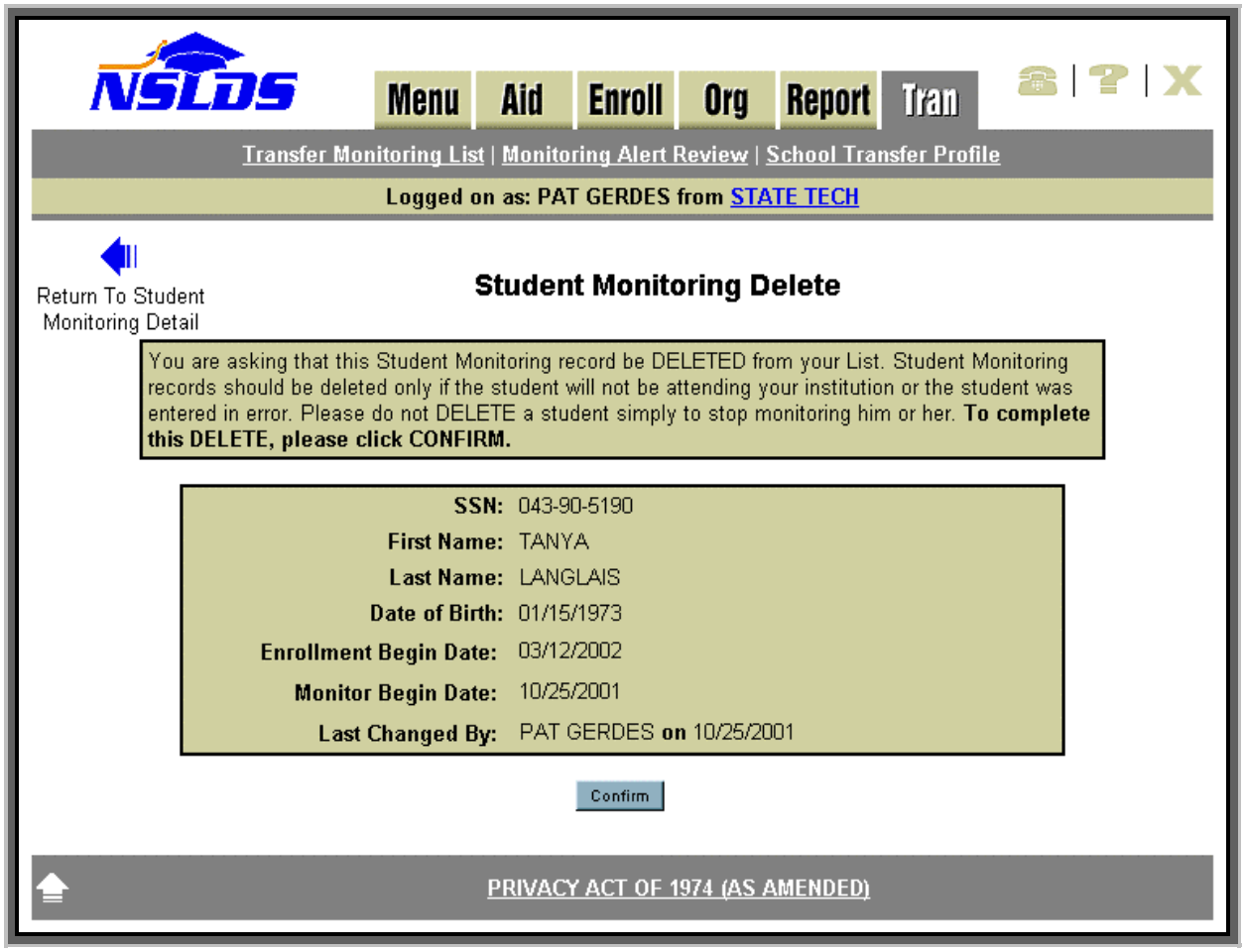


Figure 62, Student Monitoring Delete

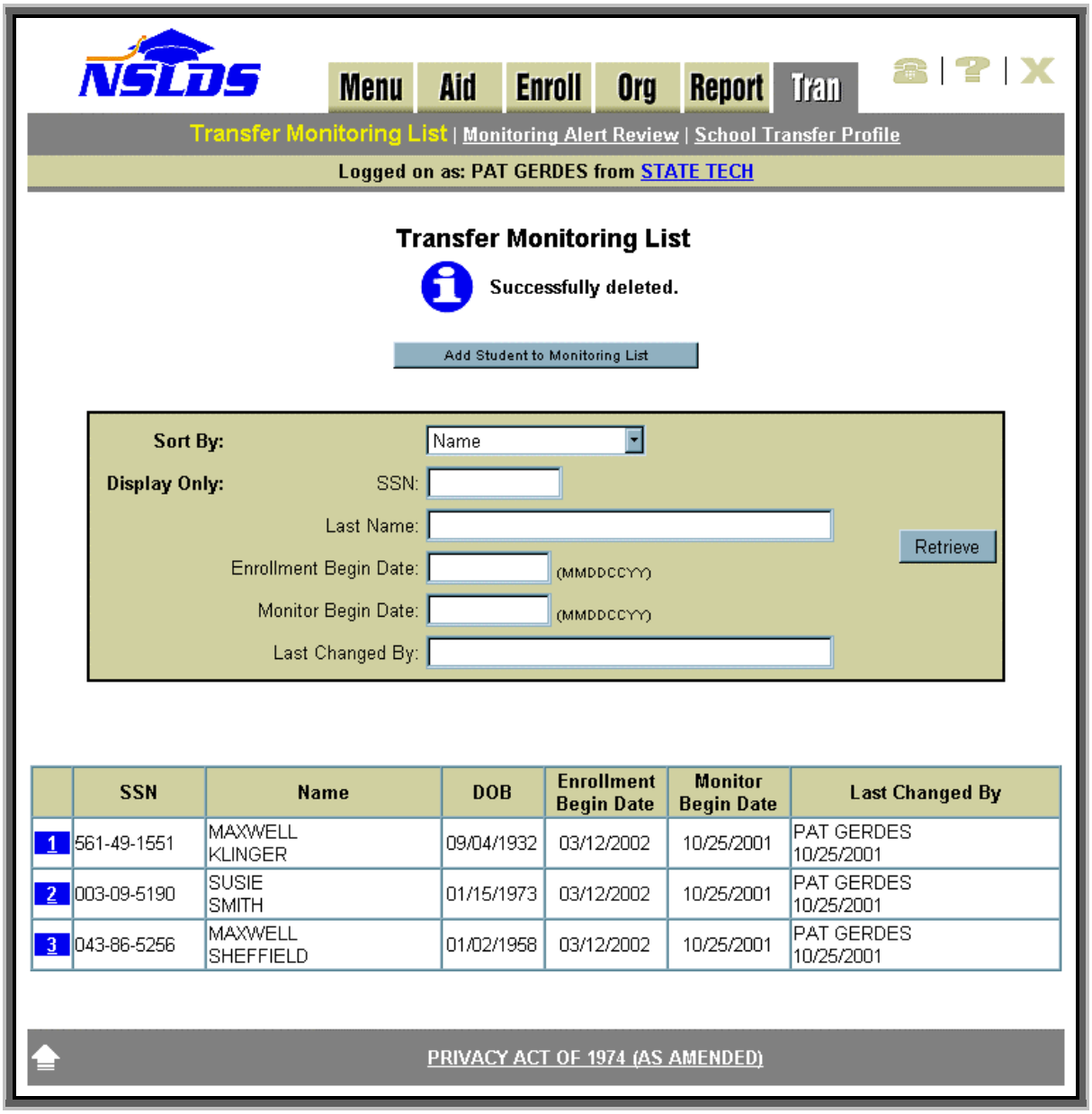


Figure 63, Transfer Monitoring List After Delete

1.3.6.4 Screen Name: Monitoring Alert Review

Description	Lists all transfer students on a school's transfer monitoring list to which changes have been reported.
Functional Area	Student Transfer Monitoring

User Group	Schools
Reference	NSLDS User Documentation, Chapter 3.8.2 Monitoring Alert Review
Comments	There were no requests to modify this screen.

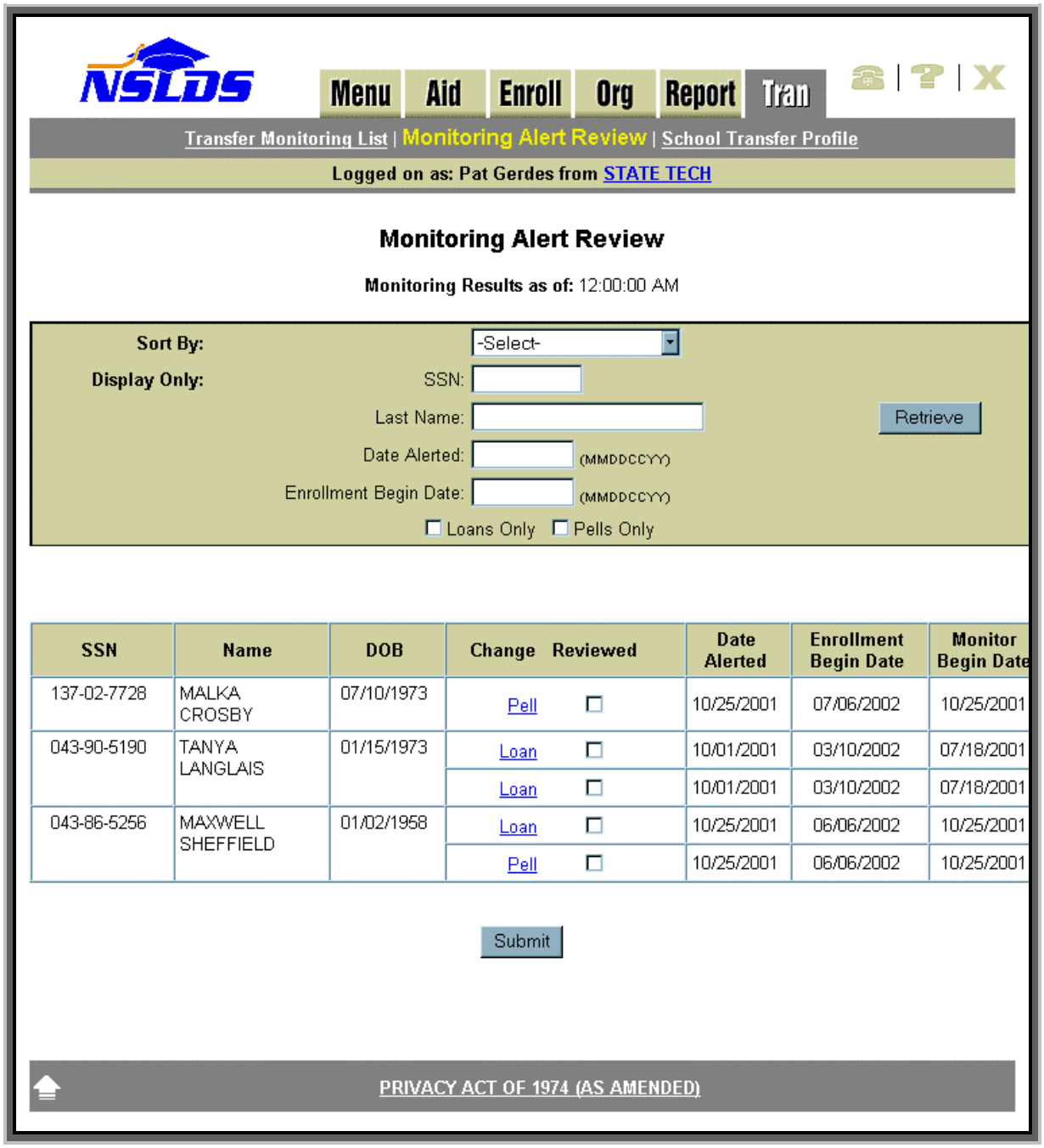


Figure 64, Monitoring Alert Review

1.3.6.5 Screen Name: School Transfer Profile

Description	Displays information about the school contact for the Transfer Monitoring process. It shows how the school is set up to submit Inform files and receive Alert notifications.
Functional Area	Student Transfer Monitoring
User Group	Schools
Reference	NSLDS User Documentation, Chapter 3.8.3 School Transfer Profile
Comments	There were no requests to modify this screen.

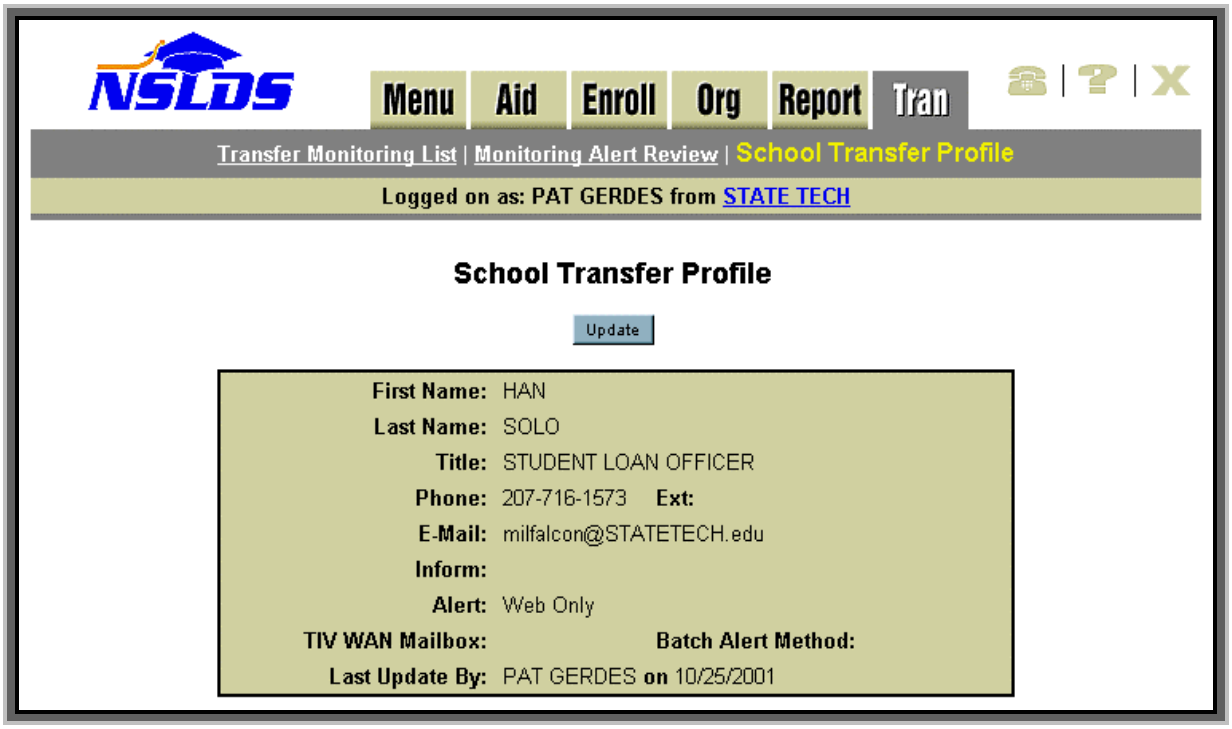


Figure 65, School Transfer Profile

1.3.6.6 Screen Name: School Transfer Profile Add

Description	Allows a user to add School Transfer Profile information.
Functional Area	Student Transfer Monitoring
User Group	Schools
Reference	NSLDS User Documentation, Chapter 3.8.3.1 School Transfer Profile Add
Comments	There were no requests to modify this screen.

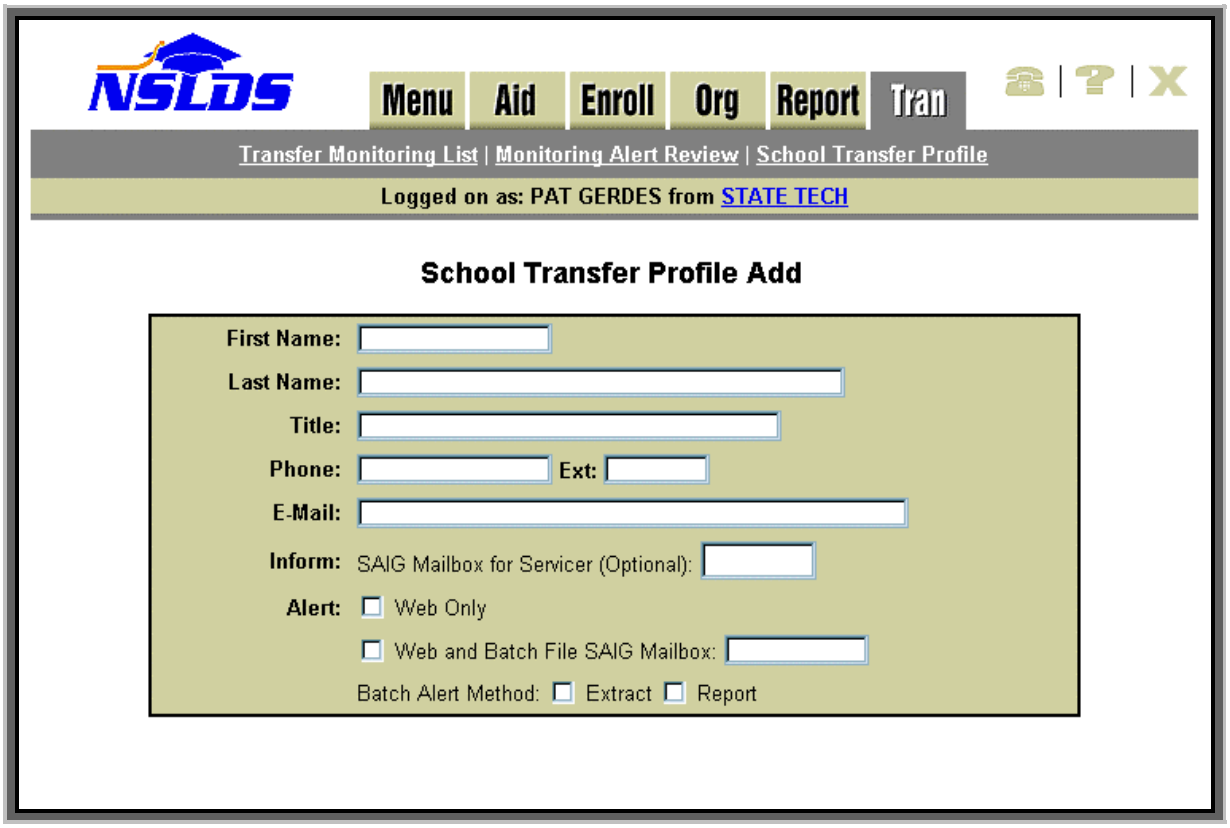


Figure 66, School Transfer Profile Add

1.3.6.7 Screen Name: School Transfer Profile Update

Description	Allows a user to update the School Transfer Profile information.
Functional Area	Student Transfer Monitoring
User Group	Schools
Reference	NSLDS User Documentation, Chapter 3.8.3.2 School Transfer Profile

	Update
Comments	There were no requests to modify this screen.

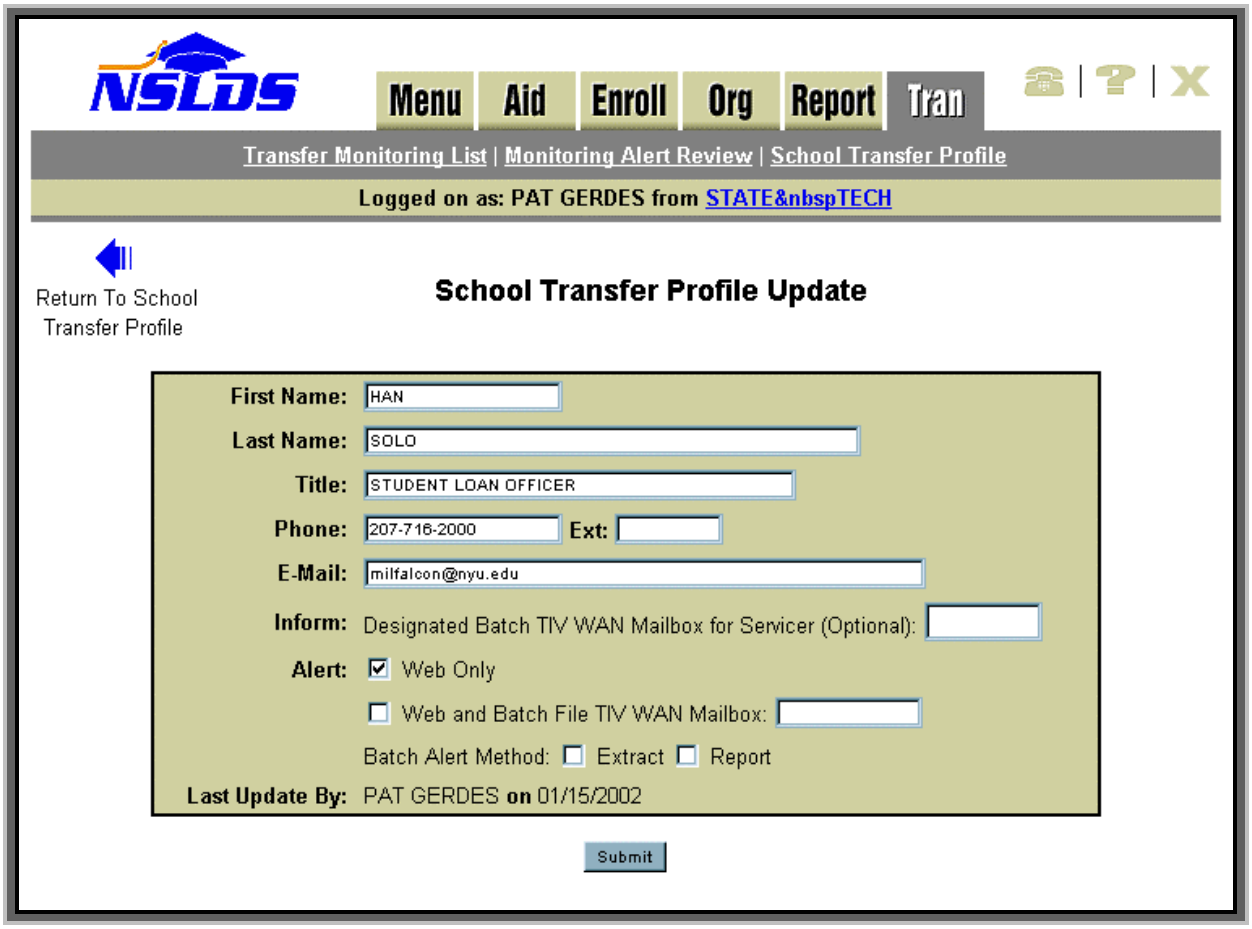


Figure 67, School Transfer Profile Update

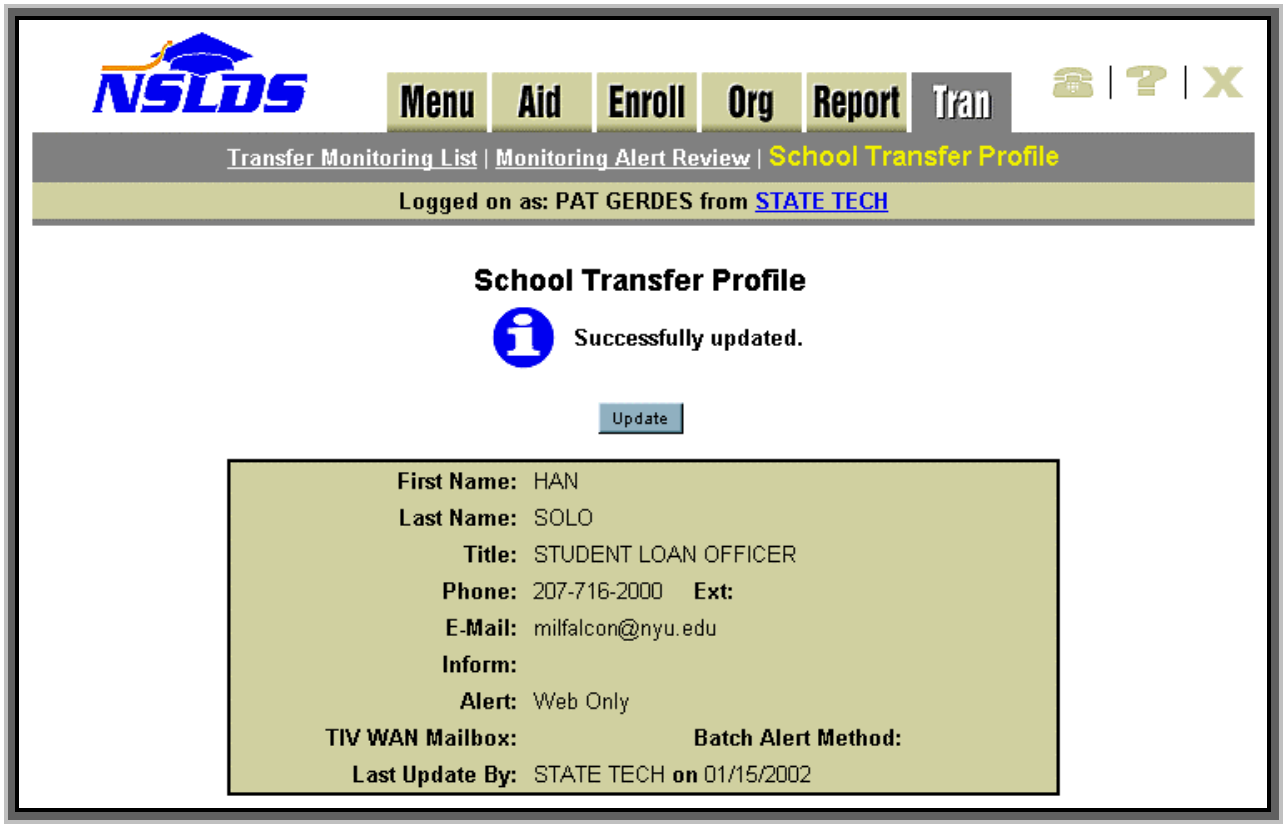


Figure 68, School Transfer Profile Update Confirmation

1.4 SAFAR Website

The SAFAR website allows borrowers to view their Title IV loan information online. The two screens that are most often accessed are the Loan Summary and Loan Detail screens. The Loan Summary screen displays the borrower's loan information in a consolidated manner. The Loan Detail screen allows borrower's to view additional details for a specific loan, such as the loan history or the holder of the loan.

In order to access this sensitive information via the Internet, each student must be registered with the SAFAR website and must have a valid User ID and Password to logon. This enables the user to be authenticated to the system and securely access the website. The PIN serves as an identifier for the borrower to access their personal information in various ED systems. Along with using the PIN to access NSLDS website information, it can also be used to sign documents (e.g., promissory notes), complete FAFSA information online, and access Direct Loan Entry and Exit Counseling services. The following screens can be accessed from the SAFAR website.

1.4.1.1 Screen Name: FAQ

Description	Provides responses to frequently asked questions regarding the SAFAR website.
Functional Area	This screen does not support any of the core NSLDS functions.
User Group	ED/FSA, Schools, Lenders, GAs, Students, State Agencies
Reference	None
Comments	There were no requests to modify this screen.

Figure 69, SAFAR FAQ

1.4.1.2 Screen Name: Browser Information

Description	Describes the browser requirements for the SAFAR website.
Functional Area	This screen does not support any of the core NSLDS functions.
User Group	ED/FSA, Schools, Lenders, GAs, Students, State Agencies
Reference	None
Comments	There were no requests to modify this screen.

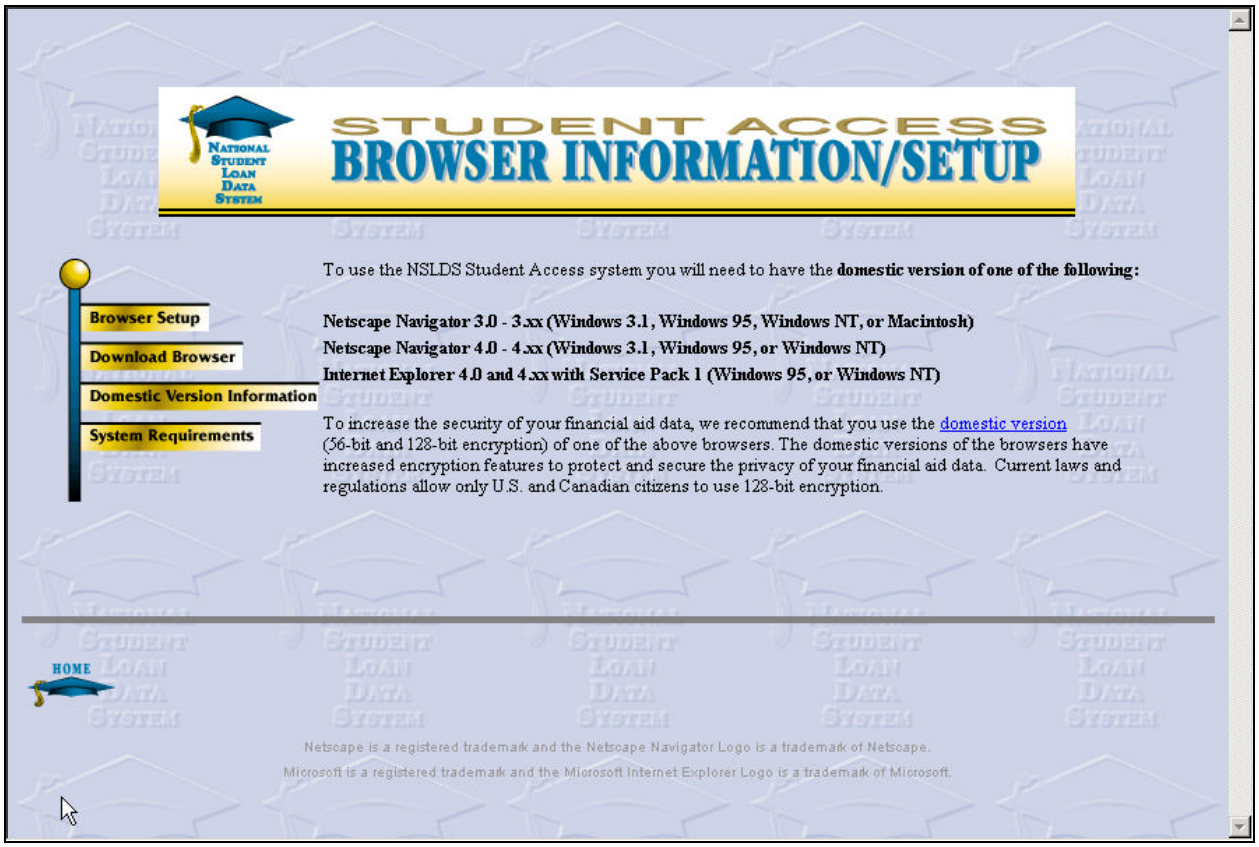


Figure 70, Browser Information

1.4.1.3 Screen Name: Browser Setup

Description	Confirms the user's browser settings to ensure privacy.
Functional Area	This screen does not support any of the core NSLDS functions.
User Group	ED/FSA, Schools, Lenders, GAs, Students, State Agencies
Reference	None
Comments	There were no requests to modify this screen.

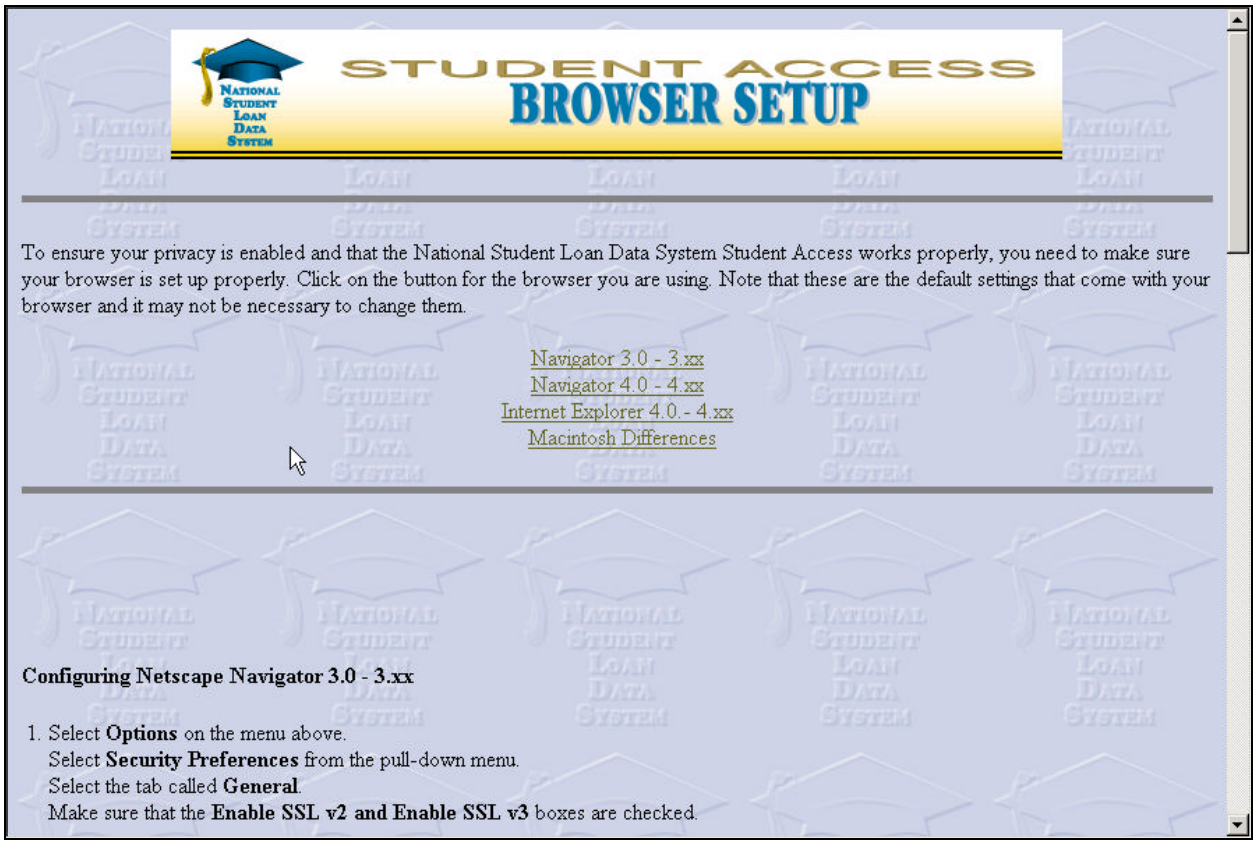


Figure 71, Browser Setup

1.4.1.4 Screen Name: Download Browser

Description	Allows a user to download a web browser.
Functional Area	This screen does not support any of the core NSLDS functions.
User Group	ED/FSA, Schools, Lenders, GAs, Students, State Agencies
Reference	None
Comments	There were no requests to modify this screen.

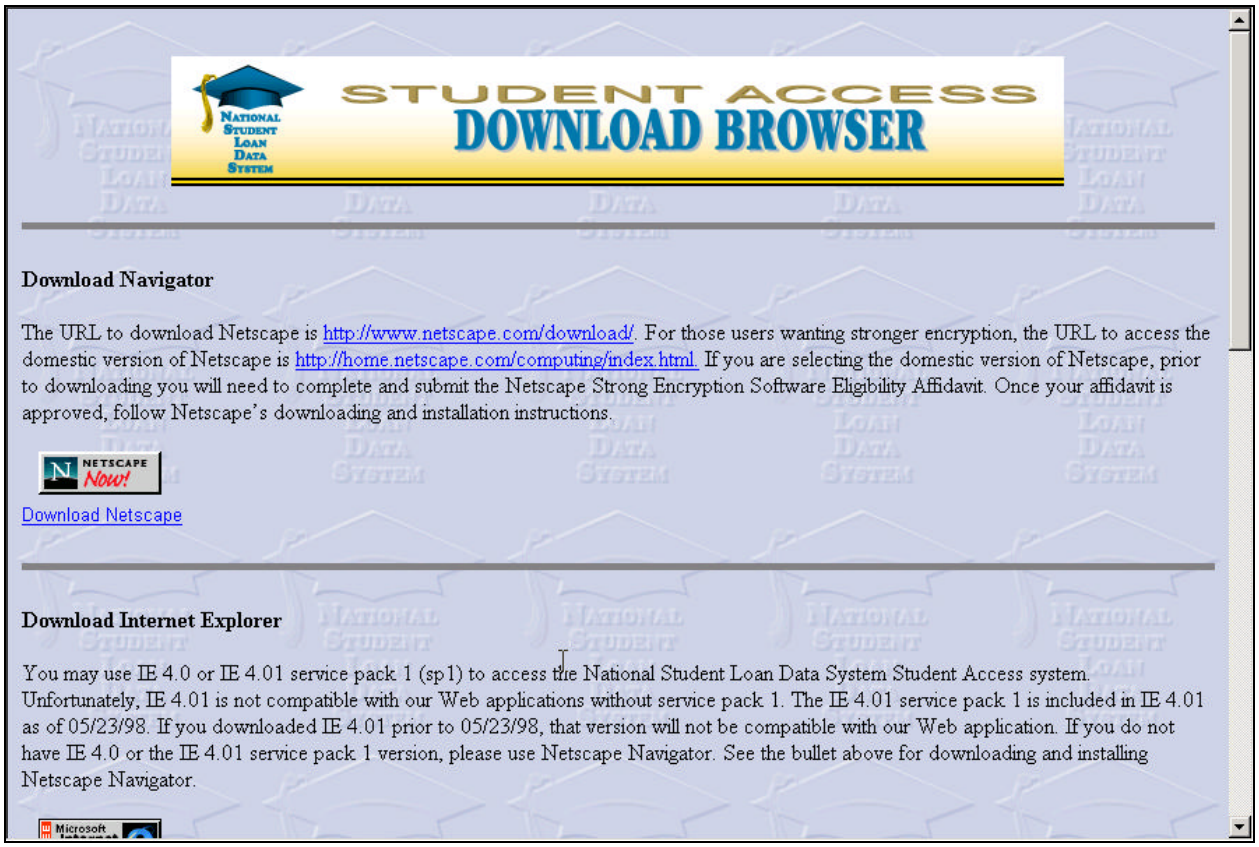


Figure 72, Download Browser

1.4.1.5 Screen Name: Domestic Version Information

Description	Allows a user to confirm they are using a domestic browser for security purposes.
Functional Area	This screen does not support any of the core NSLDS functions.
User Group	ED/FSA, Schools, Lenders, GAs, Students, State Agencies
Reference	None
Comments	There were no requests to modify this screen.

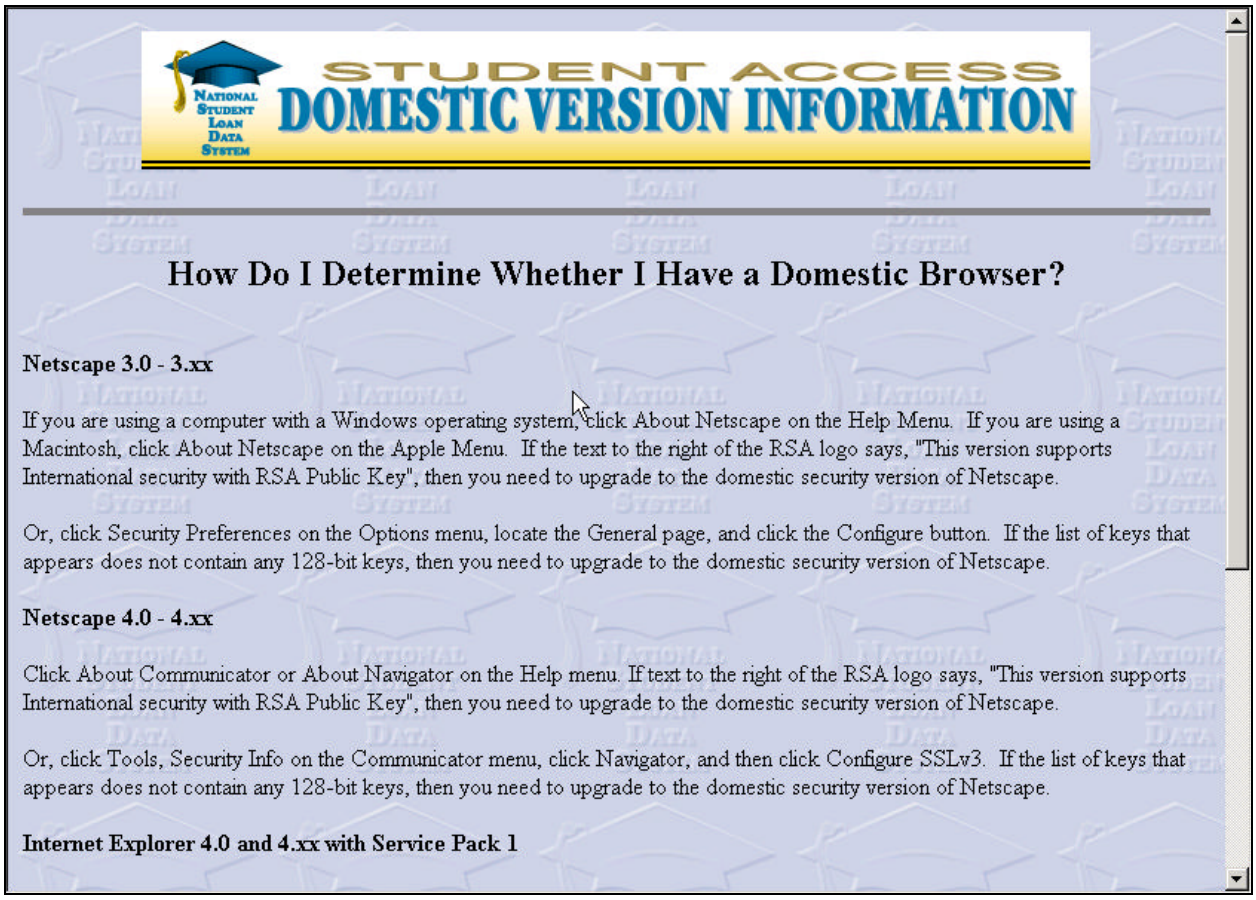


Figure 73, Domestic Version Information

1.4.1.6 Screen Name: System Requirements

Description	Describes the system requirements for the SAFAR website.
Functional Area	This screen does not support any of the core NSLDS functions.
User Group	ED/FSA, Schools, Lenders, GAs, Students, State Agencies
Reference	None
Comments	There were no requests to modify this screen.

Figure 74, System Requirements

1.4.1.7 Screen Name: Gathering Your Information

Description	Allows a user to acknowledge they have read and agree with the Privacy Act after each log on.
Functional Area	This screen does not support any of the core NSLDS functions.
User Group	ED/FSA, Schools, Lenders, GAs, Students, State Agencies
Reference	None
Comments	There were no requests to modify this screen.

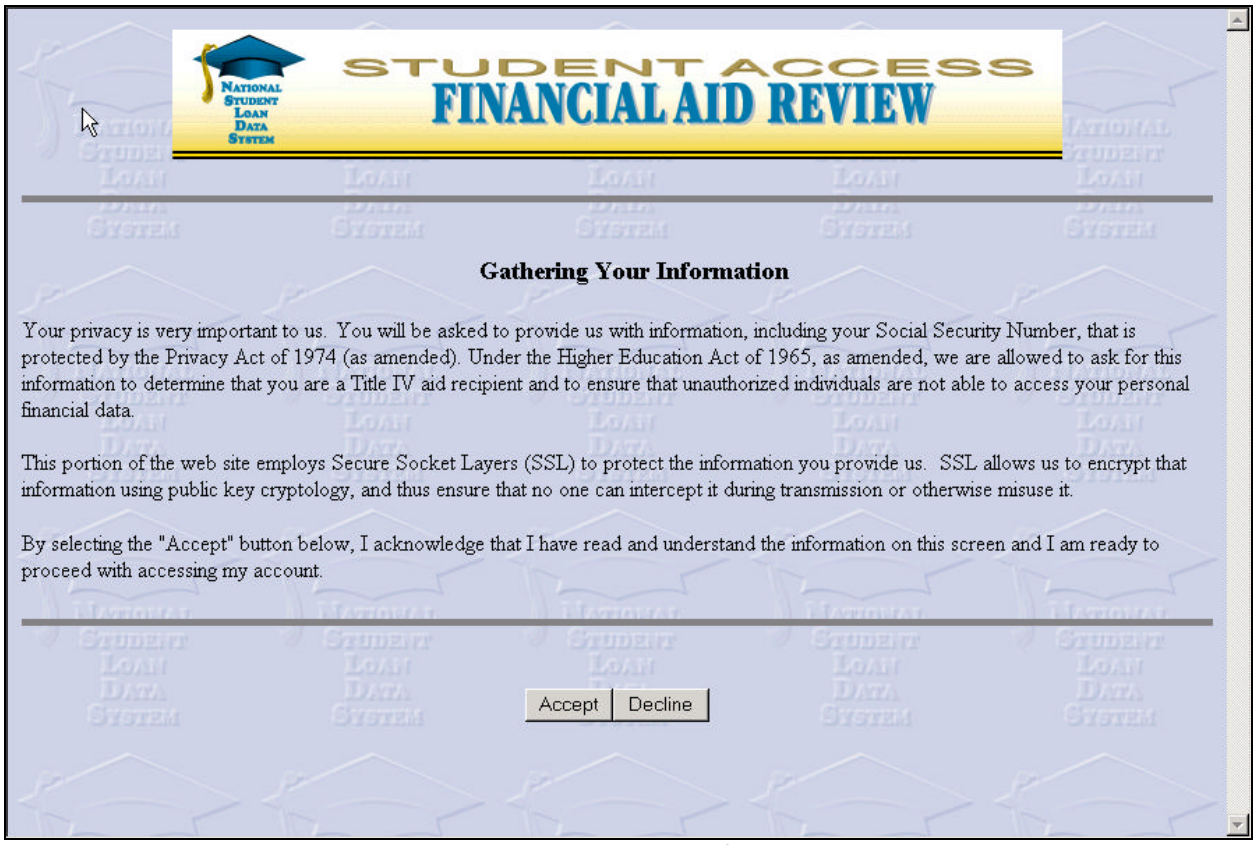


Figure 75, Gathering Your Information

1.4.1.8 Screen Name: Contact Us

Description	Provides a user with help contact information.
Functional Area	This screen does not support any of the core NSLDS functions.
User Group	ED/FSA, Schools, Lenders, GAs, Students, State Agencies
Reference	None
Comments	There were no requests to modify this screen.

Figure 76, Contact Us

1.4.1.9 Screen Name: Links

Description	Provides links to Guaranty Agency, Lender, and Servicer websites.
Functional Area	This screen does not support any of the core NSLDS functions.
User Group	ED/FSA, Schools, Lenders, GAs, Students, State Agencies
Reference	None
Comments	There were no requests to modify this screen.

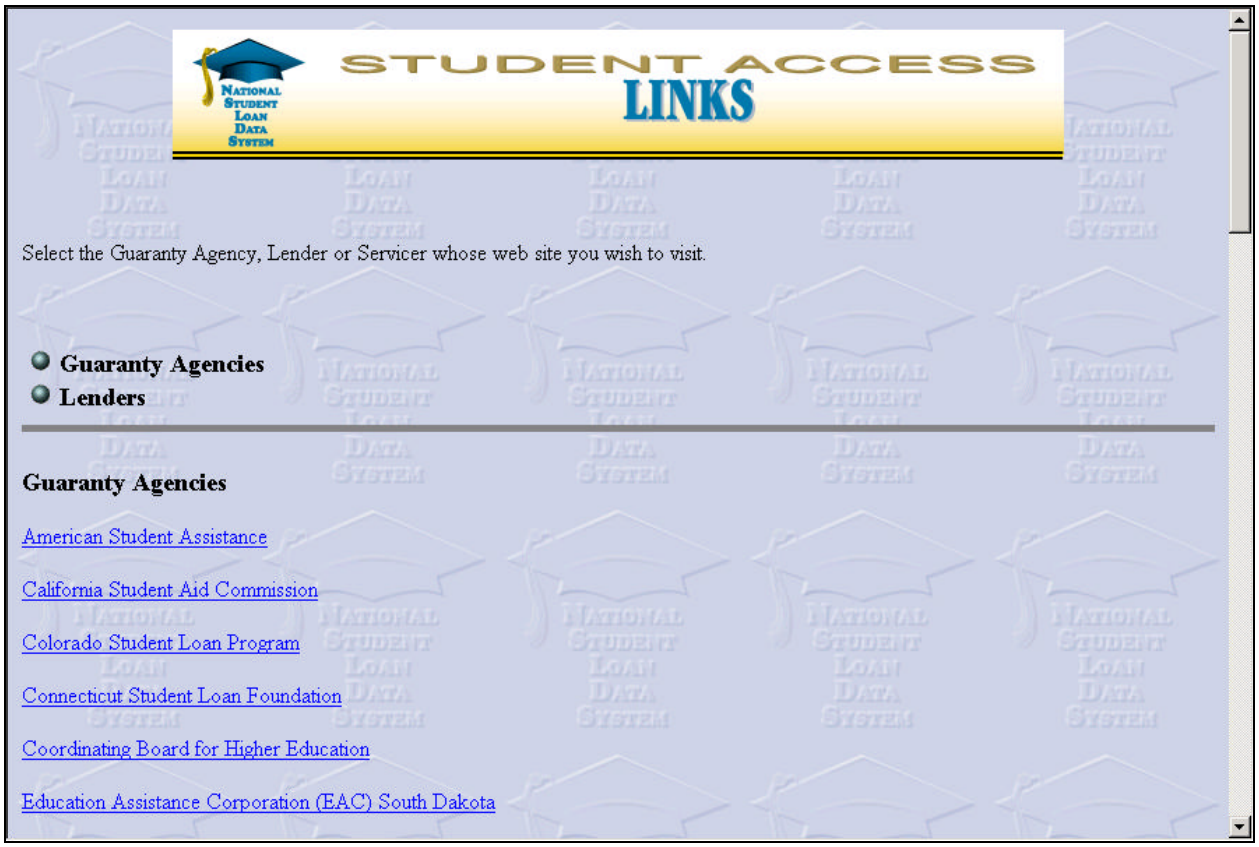


Figure 77, Links

1.4.1.10 Screen Name: PIN Request and Information

Description	Ability for a Title IV financial aid borrower to confirm their identity and access their loan information.
Functional Area	None
User Group	Students
Reference	None
Comments	There were no requests to modify this screen.

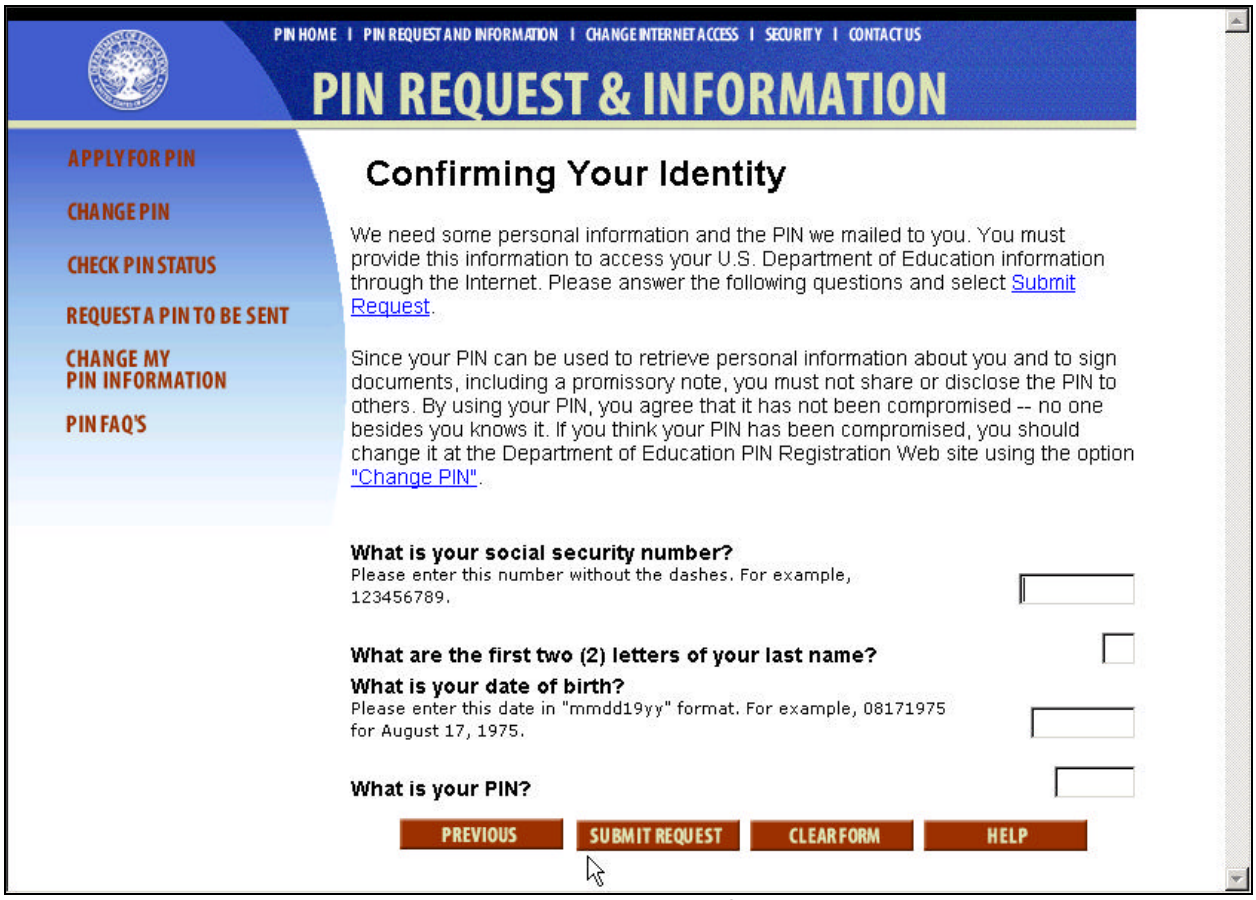


Figure 78, PIN Request and Information

1.4.1.11 Screen Name: Financial Aid Review

Description	Allows a student to view his/her loan information at a summary level, as well as grants and overpayments.
Functional Area	Financial Aid History
User Group	ED/FSA, Schools, Students
Reference	None
Comments	There were no requests to modify this screen.

Note: The layout of this screen will be provided during detail design.

1.4.1.12 Screen Name: Loan Detail

Description	Provides detail information for a specific loan.
Functional Area	Financial Aid History, Loan Transfer Tracking
User Group	ED/FSA, Schools, Students

Reference	None
Comments	There were no requests to modify this screen.

Note: The layout of this screen will be provided during detail design.

1.4.1.13 Screen Name: Glossary

Description	Lists key terms used in the website and their definitions.
Functional Area	This screen does not support any of the core NSLDS functions.
User Group	ED/FSA, Schools, Lenders, GAs, Students, State Agencies
Reference	None
Comments	There were no requests to modify this screen.

Figure 79, Glossary

1.4.1.14 Screen Name: Logoff

Description	Allows a user to log off the SAFAR website.
Functional Area	This screen does not support any of the core NSLDS functions.

User Group	ED/FSA, Schools, Lenders, GAs, Students, State Agencies
Reference	None
Comments	There were no requests to modify this screen.

Note: The layout of this screen will be provided during detail design.

Appendix A: User Interface Inventory Matrix

User Interface	Screen Function	Screen Name	Description	Access						NSLDS II Functional Areas										Enhancement Recommendations	Comments
				ED/FSA	Schools	Lenders	GAs	State Agencies	Students	Student Aid Eligibility	Financial Aid History	Student Transfer Monitoring	Loan Transfer Tracking	Payment Reasonability	Cohort Default Rate	Enrollment Tracking	Audit & Program Reviews	Research & Policy Development	Budget Formulation & Execution		
Financial Aid Professional (FAP) website																					- The NSLDS Financial Aid Professional website can be found at http://www.nsldsfap.ed.gov.
	System Log On																				
		System Log On	Allows Schools, Lenders, GAs, Servicers, ED employees, and state agencies to log on to the Financial Aid Professional website.	X	X	X	X	X													- This screen does not support any of the core NSLDS functions.
		Privacy Act	Allows a user to acknowledge they have read and agree with the Privacy Act after each log on.	X	X	X	X	X													- This screen does not support any of the core NSLDS functions. - Only one time each day. All pages containing Privacy Act Data have a link to this page.
		Help	Directs a user to the help page. A user can also access a glossary of the NSLDS website terms.	X	X	X	X	X													- This screen does not support any of the core NSLDS functions. - Each NSLDSFAP page contains a help icon which directs a user to the help page. A user can also access a glossary of the NSLDS website terms.
		Menu	Allows a user the ability to navigate to the Message Detail, Financial Aid, Enrollment, Organization, Report, Transfer Monitoring, and Support screens (depending on authorization).	X	X	X	X	X													- This screen does not support any of the core NSLDS functions.
		Change Password	Allows a user to change their password.	X	X	X	X	X													- This screen does not support any of the core NSLDS functions.
		System Requirements	Describes the system requirements for the Financial Aid Professional website.	X	X	X	X	X													- This screen does not support any of the core NSLDS functions.
		Contact Us	Provides user help contact information.	X	X	X	X	X													- This screen does not support any of the core NSLDS functions. - Each page contains an icon which links to the Contact Us page which provides user help contact information.
		Frequently Asked Questions (FAQ)	Provides responses to frequently asked questions regarding the website.	X	X	X	X	X													- This screen does not support any of the core NSLDS functions.
		Download Help	Allows a user to download help files related to the FAP website.	X	X	X	X	X													- This screen does not support any of the core NSLDS functions.
		Message Detail	Displays the selected news or updates in detail for the user community.	X	X	X	X	X													- This screen does not support any of the core NSLDS functions.
		Security	Provides information regarding website security.	X	X	X	X	X													- This screen does not support any of the core NSLDS functions.
	Financial Aid																				
		Loan History	Displays a borrower's Title IV Aggregate Loan Information and Loan Summary.	X	X			X		X	**X**	X						X		- Ability to view the last reported date for a loan by the GA. The last reported date does not need to be displayed in the Loan Summary section of the Loan History screen but should be accessible from this screen. - Ability to display student contact information, which includes address and telephone number.	- The ability to view the student contact information in the FAP website will not be satisfied in the first release because it will require changes to the external interfaces which is out of scope for the first release.
		Student/PLUS Borrower Name Search	Allows a user to search for records in the NSLDS database by complete or partial name, rather than SSN. A user can search by first name, last name, first and last name, and by a partial or exact match type.	X							**X**	X						X			

User Interface	Screen Function	Screen Name	Description	Access						NSLDS II Functional Areas										Enhancement Recommendations	Comments
				ED/FSA	Schools	Lenders	GAs	State Agencies	Students	Student Aid Eligibility	Financial Aid History	Student Transfer Monitoring	Loan Transfer Tracking	Payment Reasonability	Cohort Default Rate	Enrollment Tracking	Audit & Program Reviews	Research & Policy Development	Budget Formulation & Execution		
		Borrower Name History	Lists name changes for a borrower in the NSLDS database.	X	X	X	X	X			X	X						X			
		Borrower SSN History	Lists any associated Social Security Numbers the borrower has been identified with in the past.	X	X	X	X	X			X	X						X			
		Loan Detail	Displays historical data for a loan, which includes loan amounts, loan activity, loan status changes, and the GA, Lender, and/or Servicer history.	X	X	X	X	X		X	X		X					X			
		Overpayment History List	Displays the overpayments reported to NSLDS for a student. The Overpayment History page summarizes past and present Perkins loan, Supplemental Educational Opportunity Grant (SEOG), and Pell grant overpayments for students. A user will also have the ability to add overpayment history information for a student from this screen. Once the overpayment information has been added, the user will receive a confirmation notifying them the overpayment was successfully added.	X	X	X	X	X		X	X							X			
		Overpayment Add	Allows a user to enter student identifier and overpayment information for a student who owes an overpayment on a Title IV grant or a Perkins loan.	X						X	X										
		Overpayment Add and Student Add	Allows a user to enter student identifier and overpayment information for a student who owes an overpayment on a Title IV grant or a Perkins loan. Overpayment data reported by schools are added to the NSLDS and then transferred to the Central Processing System for inclusion on SARs and ISIRs.	X						X	X										
		Overpayment Display	Allows a user to update or delete an overpayment listed on the Overpayment History page. A user will also be able to update or delete overpayment information from this screen.	X	X	X	X	X		X	X										
		Overpayment Update	Allows a user to update the overpayment information for a student.	X	X					X	X										
		Overpayment Delete Confirmation	Allows a user to delete an overpayment when the overpayment has been entered in error.	X	X					X	X										
		Pell Grant History	Allows a user to view Pell grants that a student has been awarded.	X	X			X			X							X		- Ability for user to view the date a borrower attended a specific school.	- This enhancement requirement is currently under FSA review and may be implemented by Raytheon before development for NSLDS II occurs.
		Student Access Interface	Links the Financial Aid Professional website to the SAFAR website. This allows a user to view the borrower's financial aid records as the borrower would view them.	X	X						X										
	Enrollment																				
		Enrollment Summary	Provides an overview of a student's most recent status at every school where enrollment has been reported for that student.	X	X	X	X	X								X		X			
		Enrollment Detail	Displays a detailed history of a student's enrollment status at one or more schools.	X	X	X	X	X								X		X			
		Enrollment Timeline	Displays a chronological view of a student's enrollment history. This page is intended to help users, especially lenders, see all of a student's enrollment statuses at a given time in the past and how long those statuses remained in effect.	X	X	X	X	X								X					
		Enrollment Maintenance	Allows school users to update the enrollment information for students attending their school. A user will be asked to confirm the enrollment information before submittal.	X	X											X					

User Interface	Screen Function	Screen Name	Description	Access						NSLDS II Functional Areas										Enhancement Recommendations	Comments
				ED/FSA	Schools	Lenders	GAs	State Agencies	Students	Student Aid Eligibility	Financial Aid History	Student Transfer Monitoring	Loan Transfer Tracking	Payment Reasonability	Cohort Default Rate	Enrollment Tracking	Audit & Program Reviews	Research & Policy Development	Budget Formulation & Execution		
		Enrollment Add	Allows school users to retrieve student records, so they can update enrollment information for those students on the Enrollment Maintenance page	X	X											X					
		Enrollment Update	Allows school users to retrieve enrollment information for students attending their school so they can update that information on the Enrollment Maintenance page.	X	X											X					
		Enrollment Reporting Schedule	Displays a user profile as well as current and past schedules for organizations that report or receive information about the enrollment status of students receiving federal student aid. The current schedule extends one year into the future. The past schedule extends one year into the past.	X	X	X	X									X					
		Enrollment Reporting Schedule Create	Allows a user to create a new schedule for their organization to receive enrollment status files from the NSLDS.	X	X	X	X									X					
		Enrollment Reporting Schedule Modify	Allows a user to modify their organization's current schedule for receiving enrollment status files from NSLDS.	X	X	X	X									X					
	Organization																				
		Organization Contact List	Displays the organization and summary contact information for the NSLDS functions.	X	X	X	X	X					X				X	X			
		Organization Contact Detail	Displays contact information for one of the organization's contacts. A user can also update and delete organization contact information from this screen.	X	X	X	X	X					X				X	X			
		Organization Contact Update	Allows a user to update contact information for their organization.	X	X	X	X	X					X				X				
		Organization Contact Delete	Allows a user to delete a contact on the Organization Contact List.	X	X	X	X	X					X				X				
		Organization Contact Add	Allows a user to add new contact information for their organization to NSLDS.	X	X	X	X	X					X				X			- Ability to select "Bankruptcy Issues" from the "Available Functions" drop down list.	
		Organization Search	Allows a user to find an organization stored in NSLDS.	X	X	X	X	X					X				X				
		Organization Search Pop-Up Window	Allows a user to quickly find an organization's name or code for specific reports.	X	X	X	X	X					X				X				- The new reporting architecture will need to support this functionality. This screen will not be accessible in NSLDS II because it is currently part of the existing reporting functionality which is being replaced.
		Data Provider Schedule	Displays a history of current, past, and future scheduled data provider submittals.	X	X		X							X							- Based on access authorization, users can view error rates.
		Repayment Information	Displays the current repayment status of certain borrowers in Federal Family Education Loan (FFEL) and Direct Loan (DL) programs who attended a school during a specific period.	X	X		X							X							- This information has no relationship to the calculation of a draft or final cohort default for a school and is not used in that process.
		Cohort Default Rate History List	Allows a user to view a history of the default rates for the selected organization and request Loan Details.	X	X	X	X								X			X		- Ability for a user to view the "School Num", "School Denom" and "Rate".	
		School Profile	Allows a user to view Title IV grant and loan programs, as well as the school's academic and program schedule information.	X													X				
	Reports																				
		Report List	Displays a list of predefined reports available for retrieval.	X	X	X	X	x		X	X	X	X	X	X	X	X	X			
		Report Parameters	Allows a user to choose the Type (report or extract) and the Report Parameters, including the Sort By and the Output Medium for a report.	X	X	X	X	x		X	X	X	X	X	X	X	X	X			

User Interface	Screen Function	Screen Name	Description	Access						NSLDS II Functional Areas										Enhancement Recommendations	Comments
				ED/FSA	Schools	Lenders	GAs	State Agencies	Students	Student Aid Eligibility	Financial Aid History	Student Transfer Monitoring	Loan Transfer Tracking	Payment Reasonability	Cohort Default Rate	Enrollment Tracking	Audit & Program Reviews	Research & Policy Development	Budget Formulation & Execution		
		Report Log	Stores a record of each report requested by an organization along with the requesting individual and the date.	X	X	X	X	x		X	X	X	X	X	X	X	X	X			
	Transfer Monitoring																				
		Transfer Monitoring List	Lists all transfer students submitted by the school to be monitored by NSLDS for reported changes.		X							X						X			
		Student Monitoring Add	Allows a user to add a student to the Transfer Monitoring List.		X							X									
		Student Monitoring Detail	Displays detailed transfer monitoring student information that can be updated or deleted.		X							X									
		Monitoring Alert Review	Lists all transfer students on a school's transfer monitoring list to which changes have been reported.		X							X									
		School Transfer Profile	Displays information about the school contact for the Transfer Monitoring process. It shows how the school is set up to submit Inform files and receive Alert notifications.		X							X									
		School Transfer Add	Allows a user to add School Transfer Profile information.		X							X									
		School Transfer Update	Allows a user to update the School Transfer Profile information.		X							X									
Student Access Financial Aid Review (SAFAR) website																				- The NSLDS Financial Aid Professional website can be found at http://www.nslds.ed.gov.	
		FAQ	Provides responses to frequently asked questions regarding the SAFAR website.	x	x	x	x	x	X											- This screen does not support any of the core NSLDS functions.	
		Browser Information	Describes the browser requirements for the SAFAR website.	x	x	x	x	x	X											- This screen does not support any of the core NSLDS functions.	
		Bowser Setup	Confirms the user's browser settings to ensure privacy.	x	x	x	x	x	X											- This screen does not support any of the core NSLDS functions.	
		Download Browser	Allows a user to download a browser.	x	x	x	x	x	X											- This screen does not support any of the core NSLDS functions.	
		Domestic Version Information	Allows a user to confirm they are using a domestic browser for security purposes.	x	x	x	x	x	X											- This screen does not support any of the core NSLDS functions.	
		System Requirements	Describes the system requirements for the SAFAR website.	x	x	x	x	x	X											- This screen does not support any of the core NSLDS functions.	
		Gathering Your Information	Allows a user to acknowledge they have read and agree with the Privacy Act after each log on.	x	x	x	x	x	X											- This screen does not support any of the core NSLDS functions.	
		Contact Us	Provides a user with help contact information.	x	x	x	x	x	X											- This screen does not support any of the core NSLDS functions.	
		Links	Provides links to Guaranty Agency, Lender, and Servicer websites.	x	x	x	x	x	X											- This screen does not support any of the core NSLDS functions.	
		PIN Request and Information	Ability for a Title IV financial aid borrower to confirm their identity and access their loan information.						X											- This screen does not support any of the core NSLDS functions.	
		Financial Aid Review	Allows a student to view his/her loan information at a summary level, as well as grants and overpayments.	x	x				X		X										
		Loan Detail	Provides detail information for a specific loan.	x	x				X		X		X								
		Glossary	Lists key terms used in the website and their definitions.	x	x	x	x	x	X											- This screen does not support any of the core NSLDS functions.	
		Logoff	Allows a user to log off the SAFAR website.	x	x	x	x	x	X											- This screen does not support any of the core NSLDS functions.	
CICS																					
		Enrollment Waiver	Allows a user to grant waivers to schools for not reporting enrollment information in a timely manner.	X												X				- A new screen will be developed within the FAP website to support the Enrollment Waiver functionality. It is currently being supported through CICS.	

User Interface	Screen Function	Screen Name	Description	Access						NSLDS II Functional Areas										Enhancement Recommendations	Comments
				ED/FSA	Schools	Lenders	GAs	State Agencies	Students	Student Aid Eligibility	Financial Aid History	Student Transfer Monitoring	Loan Transfer Tracking	Payment Reasonability	Cohort Default Rate	Enrollment Tracking	Audit & Program Reviews	Research & Policy Development	Budget Formulation & Execution		
		Rate Substitution	Allows Default Management to record that one school's rate should be substituted for another school's rate.	X											X					- A new screen will be developed within the FAP website to support the Rate Substitution functionality. It is currently being supported through CICS.	
		Rate Combination	Allows Default Management to record that the rates for two or more schools should be aggregated and assigned to one school (Lead School Combo) or to all schools (True Combo).	X											X					- A new screen will be developed within the FAP website to support the Rate Combination functionality. It is currently being supported through CICS.	- A lead school is one that is currently eligible and certified for Title IV loan programs and receives data from underlying schools (listed subordinately in the merger screen). Other schools making up a merger, may or may not be elig/cert. The combination period date is usually the date that the change of status occurred (beginning date) and ending date has, in the past, been 12-31-9999 (indefinite time frame).
		Suspend Default Rates	Allows Default Management to prevent a rate for a school from displaying in any online or paper report by court order. Only displayable to Default Management users.	X											X					- A new screen will be developed within the FAP website to support the Suspend Default Rates functionality. It is currently being supported through CICS.	- The calculated numerator and denominator numbers and supporting data are available only to a limited set of Default Management personnel. The contractor retains access to all rates, including those specified as suspended, so that necessary support can be provided. Although Default Management personnel remain able to generate LRDR for any school, others generate only for selected rates.
		Default Rate Override Request	Allows a user to override the cohort default rate information for an organization.	X											X						- This screen is not used according to Raytheon and ED. The default rate override functionality is supported through a batch process by PEPS.
		GA Default Rate Calculation Request		X																	- According to Raytheon, this screen is not used. ED personnel do not have access to this screen through CICS.
		Formula and Threshold Maintenance		X																	- According to Raytheon, this screen is not used. ED personnel do not have access to this screen through CICS.
		Annual, Default, Notional, State Default Rate Calculation Request	For internal use only by Raytheon and CSC to indicate an official or draft calculation.	X											X						- ED personnel do not have access to this screen through CICS.